

**A Guide for Applicants  
for the Diaconate  
in the Diocese of Ohio**

**Commission on Ministry  
2012**

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## AN OUTLINE OF THE STEPS OF THE ORDINATION PROCESS

### **I. Discernment at the Parish Level (p. 7)**

- a) Conversation with the clergy in charge of the congregation.
- b) Find a spiritual director.
- c) Attend Ministry Discernment Day with clergy in charge or other priest from the parish.
- d) *Parish Discernment Support Group (PDSG) formed by clergy in charge?*
- e) Volunteer experience at another parish (optional).
- f) Recommendation letter from the clergy in charge sent to the bishop with evaluation from PDSG.
- g) Submit application for the Diaconate, work history, and 3-4 page spiritual autobiography.

### **II. The Vocations Committee (p. 9?)**

- a) *Vocations Committee meets with the applicant for at least four sessions.*
- b) *The Vocations Committee prepares a written evaluation and recommendation regarding attendance at BACAM (see below).*
- c) *The Vocations Committee shares its written evaluation with the applicant.*

### **III. Bishop's Advisory Conference on Applicants for Ordained Ministry (BACAM) (p. 10)**

- a) Applicant schedules an appointment with the bishop prior to BACAM.
- b) Applicant submits the following documents at least two weeks prior to attending BACAM:
  - i. Supplement to initial application for ordination.
  - ii. Transcripts of undergraduate and post-graduate work.
  - iii. Reference letters.
  - iv. Letter of support from Vestry.
- c) Participation in the conference, held in the late fall.
- d) BACAM evaluators submit report to Bishop.
- e) Applicant schedules an appointment with the bishop after BACAM.
- f) If the decision is made to proceed, psychiatric and medical evaluations are required. A Behavior Screening Questionnaire is completed prior to the psychiatric evaluation.
- g) Applicant submits financial statements (Appendix F).
- h) Bishop's office performs background check.

### **IV. As a Postulant (p. 12)**

- a) Postulants are assigned a liaison from the Commission on Ministry (COM) and postulants and their spouses or partners are invited to a COM meeting.
- b)
- c) Ember Day letters are to be written to the bishop four times a year on the Ember Days that occur in September, December, during Lent, and following Pentecost.
- d) Postulants and candidates must attend the annual seminarian gathering with the COM.

## **V. Becoming a Candidate (p. 14)**

- a) Postulant has interviews with the Commission on Ministry and the Standing Committee, and? in the spring of the second year of study. Postulant insures that following documents are submitted prior to the interviews:
  - i. Evaluation from field education supervisor
  - ii. Evaluation from Director of Deacon Formation Program.
  - iii. Letter to the bishop requesting to become a candidate including date of admission as postulant.
- b) Applicant has interview with sponsoring parish vestry after which they send letter of support to bishop.

## **VII. Ordination (p. 15)**

- a) Candidate has interviews with the COM and Standing Committee.
- b) Candidate insures that following documents are submitted prior to the interviews:
  - i. A letter to the bishop requesting ordination that includes dates of admission as postulant and candidate.
  - ii. .Evaluation from Director of Deacon Formation Program.
  - iii. Certificates of completion for canonically required training in sexual misconduct prevention, required reporting of abuse, Title IV, and the Church's teaching on racism.
  - iv. Meet with the vestry and obtain Letter of support from sponsoring Vestry
- c) Psychiatric evaluation, medical evaluation, and background check if previous evaluations completed more than 36 months before projected ordination date.
- d) Bishop's office arranges ordination liturgy.

# A THEOLOGICAL STATEMENT ON ORDAINED MINISTRY AND DISCERNMENT IN THE DIOCESE OF OHIO

## INTRODUCTION

The whole Church is responsible for raising up ordained leaders of the highest quality with the particular gifts necessary for leading faith communities in the 21<sup>st</sup> century. Therefore, both the individual and community are simultaneously participating in a process of mutual discernment and affirmation. To that end, the bishop and other representatives of the Church strive to exercise prayerful spiritual discernment and pastoral sensitivity with those who believe they might be called to ordained ministry. All diocesan committees and psychological interviewers are advisory. The final decision about ordination rests with the bishop.

## Theology and Character of the Diaconate in the Diocese of Ohio

As baptized Christians, we are all given the power to share in the priesthood and ministry of Jesus Christ. We are all called to be servants and give our lives in service to others. We are joined with each other in this vocation as the Church.

As the early Christian community grew, certain persons were given particular roles for the good order of the community and its ministry in the world. Bishops, presbyters and deacons were ordained to serve the people of God and to support all baptized persons in living out their ministries. These same orders are present in the Church today and have distinctive charisms:

The deacon is an icon of Christ's bold love of the disenfranchised and his prophetic call for justice. The deacon is one who inspires the baptized to claim their authority as ministers of Christ in the world, especially in places of greatest need. *The deacon has eyes for the world and a heart to empower the baptized.* The priest is an icon of Christ's self-emptying love, one whose disposition is for blessing and care. *A priest has eyes for the local Church and a heart to bless and care for her people.* The bishop is an icon of Christian unity, one who is the guardian of the community of the faithful. She is one whose disposition is for wholeness and reconciliation with God and one another. *A bishop has eyes for the whole Church and a heart to uphold the mystery of the body of Christ.*

Deacon or *diakonia* comes from the Greek word meaning "service." The diaconate is a distinctive and significant order, though embodied and interpreted differently throughout the church's history. The ministry of the deacon develops as the needs of the Church and world determine. Recently, the Diocese of Ohio's discernment of the role of its deacons has changed significantly. While once deacons were encouraged to find their individualized ministries and be the primary agents of service, social

advocacy and justice, we now see the deacon as the one who challenges the Church with the needs of the world and calls **all the baptized as the primary agents of service**. Ohio understands the deacon as the one who has eyes for the world and a heart to empower the body of Christ to serve all the children of God. The ministry of the deacon is one of teaching, inviting, challenging and encouraging the faithful to fulfill their baptismal promises.

As a leader of the Church in the world the deacon's ministry may not occur primarily within the walls of the Church. The deacon may have particular experience in any number of service/justice-oriented areas, such as community organizing, legal advocacy, issues of hunger or housing. However, the deacon's vocation is to empower the faithful to service. The deacon does not carry a particular agenda, but rather, as a servant of the Church, he listens to and draws out the ministries emerging within a geographic region, deanery or Church.

Ohio understands that the deacon is called to ministry and guided by the *pastoral direction and leadership of the bishop* (BCP, p. 543). The deacon, as a collaborator, extends the ministry of unity within the Church, and is therefore extra-parochial. That is to say, assignments of deacons are made by the bishop to regions, perhaps even to local churches, as the ministry in a particular region demands. *The deacon will **not** be placed in the parish from which they have come (the "home" parish).*

As strong leaders, Ohio's deacons will have:

- A genuine interest in and empathy for all people, incorporating Ohio's broad spectrum of social, economic, racial, religious, and political differences.
- A strong interest in community building within the Church and outside the Church.
- An energy and enthusiasm that inspires others and enjoys shared ministry and the participation of all.
- An expectation and hope in the Spirit's movement in the church and world and a deep desire for joy and prophetic proclamation.
- A conviction that all the baptized are instruments of God's justice and mercy and, as with the ancient prophets, have such a love for the Church as to call all the baptized to account when we are silent, complacent or impervious to the needs of the marginalized.
- A resilience and flexibility in response to the Spirit's spontaneity, and a willingness, like all servants, to be shaped and transformed by the needs of the Church.

- A maturing sense of self, centered in God, from which they find affirmation to live out their lives and ministries.

## Expectations of the Deacon

Ordination to the diaconate is never a validation of one's lay ministry. Neither is the deacon one step away from a priest. The deacon's vocation is distinct in its own right.

A deacon has the responsibility to preach the gospel. Her focus is primarily prophetic, interpreting the needs of the world to the Church. A priest's preaching focus, on the other hand, is to cultivate, form, and ground the body of the faithful.

The deacon's liturgical function always emphasizes the needs of the community surrounding the local church and our response to those needs as faithful servants of Christ. For example, the deacon proclaims the gospel to the gathered congregation, symbolizing the gospel's relevance to the world in the midst of the church. The deacon leads the people in prayer, expressing the engagement of the baptized with the needs of God's world. The deacon sets the table, acting as an icon of the servanthood of Christ in the community of the faithful. The deacon leads the congregation into the world, where their lives become the means by which the world comes to know the love and power of God.

Although there may be a minor pastoral dimension to the work of a deacon, pastoral care is never the primary focus of the deacon's ministry. Pastoral care is the work of the priest and of Eucharistic Visitors or Stephen Ministers appropriately mentored by a priest.

In summary, deacons run the risk, because of their prophetic character, of being independent, even isolated, ministers within the Church. Not so in the Diocese of Ohio where the deacon, as an extension of the bishop's ministry of unity, calls the whole Church into cooperative, collaborative service. They are a people *who lead a life worthy of the calling to which they have been called, with all humility and gentleness, with patience, bearing with one another in love, making every effort to maintain the unity of the Spirit in the bond of peace.* (Ephesians 4:1-4)

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Any person considering applying for ordination and any clergy person participating in an applicant's discernment should be aware of the following Episcopal Church canon:

*No one shall be denied access to the selection process for ordination in this Church because of race, color, ethnic, sex, national origin, marital status, sexual orientations, disabilities or age, except as otherwise specified by these canons. No right to ordination is hereby established.*

## Title III, Canon 1, Section 2..

The bishops, Standing Committee, and Commission on Ministry of the Diocese of Ohio adopted the following policy in September 1996. The Joint Policy on Candidates for Ordination states:

*All adult communicants in good standing in the Diocese of Ohio may enter the process of discernment for a vocation in the ordained ministry and, upon successful completion of that process, are eligible for ordination.*

### **Section 1 DISCERNMENT AT THE PARISH LEVEL**

#### **CONVERSATION WITH THE CLERGY IN CHARGE**

The first step for anyone considering a vocation to the diaconate is to confer with the clergy in charge of his or her parish as soon as possible. The clergy person provides support and feedback to the individual and discerns for her/himself whether the person is called. In accepting this sober responsibility, the clergy person may discern that the individual is not called to the diaconate. Pastoral guidance and possible re-direction in the discernment process may occur at this point. As difficult as it is to say and hear that a person is not called to the diaconate it is almost always easier to have this conversation earlier than later.

Notes:

1. Except in rare cases, a person must be a communicant in good standing in a parish of the Diocese of Ohio for at least one year before beginning the formal diocesan ordination process. The bishop has the sole discretion to determine whether an exception should be granted.
2. Any applicant who has been refused postulancy two times in other dioceses will not generally be eligible for consideration in this diocese. A decision in this matter will be made on a case-by-case basis.

#### **SPIRITUAL DIRECTION**

Any person discerning a vocation to the diaconate should have a spiritual director other than his or her clergy person. A list of spiritual directors is available from the Office of Christian Vocations.

#### **MINISTRY DISCERNMENT DAY**

When appropriate, the first formal step is for the clergy in charge of the parish and the individual in discernment to attend a diocesan Ministry Discernment Day (MDD) together. A MDD is usually scheduled in the fall. This day is an opportunity to experience various discernment tools

and practices, to learn about the vocations of lay persons, lay professionals, deacons, and priests, to talk with others in discernment, and, finally, to get information about the ordination process.

Note: The clergy in charge or a priest on the staff of the individual's parish is required to attend Ministry Discernment Day with the applicant.

### ***PARISH DISCERNMENT SUPPORT GROUP (PDSG)***

*The clergy in charge convenes an informal Parish Discernment Support Group of three to four mature Christians who are familiar with the individual. This can happen either before or after attending MDD. Resources to assist the group are available from the Office of Christian Vocations. Given the varying understandings of the diaconate across the church, it is strongly suggested that the PDSG meet with a representative of the COM before meeting with the applicant.*

*The primary tasks of the PDSG are to help the individual to discern God's call, to refine the individual's ability to articulate the reason he/she believes he/she is called to the diaconate, and to be a support and resource for the individual if the process continues. As part of their discussions, the PDSG will ask the applicant to write a spiritual autobiography. The autobiography should not be longer than four pages.*

*Although not required, it may be desirable for the applicant to obtain experience in a different parish culture. Therefore, the PDSG or clergy in charge may suggest that the applicant volunteer a fixed number of hours per week in a different parish as a part of his or her discernment. The clergy in charge will help arrange this placement.*

*The PDSG will make a recommendation to the clergy in charge about the individual's call to ministry at the conclusion of its discernment. The report is only advisory. The authority to forward the individual's name to the bishop for entering the diocesan ordination process rests fully with the clergy in charge.*

*If the clergy in charge believes the individual is called to the diaconate, he/she will then send the bishop a confidential letter of recommendation that describes the clergy in charge's evaluation of the individual's suitability to become a deacon and includes the recommendation of the PDSG. The applicant will complete an Application for the diaconate, which includes a complete work history (see Appendix C) and send it, with a copy of his or her spiritual autobiography, to the Office of Christian Vocations. The application form is available as a Word document on the diocesan website. These documents are then used by the Vocations Committee in its work with the applicant.*

*The applicant must have attended MDD and be close to completing work with the PDSG before submitting the application.*

*Appendix A has questions for consideration by Clergy in Charge of congregations and Parish Discernment Support Groups. Appendix B provides guidance for discernment for teenagers and young adults.*

Notes:

***The person in the ordination process is responsible for ensuring that all documents are complete and submitted in a timely fashion and that all diocesan and canonical requirements are met throughout the process.***

*All documents and other privileged information submitted throughout the process may be shared with various groups or individuals who have an evaluative role in the process including the Bishop, Vocations Committees, BACAM evaluators, psychiatrists, the Commission on Ministry, Examining Chaplains, and the Standing Committee. The applicant's signature on the initial application gives permission for the dissemination of information.*

## **Section 2**

### **THE VOCATION DISCERNMENT COMMITTEE**

Upon receipt of a positive recommendation from the clergy in charge, as well as the person's application and spiritual autobiography, a Vocation Discernment Committee will be appointed on behalf of the Commission on Ministry and the bishop.

The purpose of the Vocation Discernment Committee is to serve as a representative of the wider church and is the first step beyond the parish in discerning the applicant's call. It is the responsibility of the Committee to decide whether or not to recommend to the bishop that the applicant be invited to a Bishop's Advisory Committee on Applicants for the Ministry (BACAM) weekend.

#### **COMMITTEE MEMBERSHIP**

The Vocation Discernment Committee consists of five people: two lay members from their sponsoring parish, a deacon, a person from the applicant's mission area and a member of the Commission on Ministry. The Office of Christian Vocations appoints a convener, and the lay person from the aspirant's mission area. The two lay parish members are appointed by the Priest-in-charge of the sponsoring parish. These should be individuals who have knowledge of the aspirant and that individual's functioning within the parish. To the extent possible, a COM member will serve on the committee or be the convener.

A training session for the committee will be scheduled before it begins its work. Training will include interview methods, interpreting work history, confidentiality, expectations and a suggested reading list.

#### **PROCEDURE**

1. The Office of Christian Vocations will send copies of the application for the diaconate, the work history and spiritual autobiography to the members of the Vocations Committee.
2. The Vocation Discernment Committee will meet with the applicant for a minimum of seven sessions over a period of not less than six months. This extended time is

- intended to make this process formative and allow the development of open, trusting relationships among all of the committee members.
3. Midway through the process, the Vocation Discernment Committee will meet either in person or through conference call with the clergy in charge of the applicant's parish to discuss communal discernment impressions of strengths and areas for growth. This meeting is critical in enabling committee members to gain insights about the applicant's functioning in the congregational community.
  4. If there is a discrepancy between the Vocation Discernment Committee and the Clergy-in-charge at the sponsoring parish as to the suitability of this person to advance in the discernment process based on the Clergy-in-charge's letter to the Office of Christian Vocations, then the convener will discuss this discrepancy and if appropriate, invite the Clergy-in-charge to meet with the Vocation Discernment Committee.
  5. The responsibility of the Vocation Discernment Committee is to recommend the applicant for BACAM, to recommend that the applicant not continue in the process, or to recommend a delay with suggestions for the applicant.
  6. The Committee is expected to reach a consensus decision. If there is significant disagreement between committee members regarding this decision, the nature of the disagreement should be reported in the written evaluation.
  7. The written evaluation of the Committee must be shared with the applicant, clergy-in-charge and then sent to the Office of Christian Vocations. The form for the report is found in Appendix D. The signature of the convener attests to the agreement of all members of the Committee. The report must be submitted to the Office of Christian Vocations not later than August 31.
  8. Information acquired by the Vocation Discernment Committee must be handled with great discretion. Confidentiality is imperative.

### **Section 3**

## **BACAM: The Bishop's Advisory Committee on Applicants to the Ministry and BECOMING A POSTULANT**

If the Vocations Committee so recommends, the applicant will be invited to attend a BACAM weekend, which is usually held in late fall. . It is held at a conference center, usually at Cedar Hills Camp and Conference Center, where the applicants and interviewers eat, worship, and stay together.

### **PRIOR TO BACAM**

The following documents need to be submitted no later than two weeks before BACAM. Materials about the applicants are sent to the evaluators at least a week prior to BACAM, so timely submission of all documents is required.

- Supplement to the initial application for ordination
- Transcripts of undergraduate and post-graduate work
- Other reference letters

- Letter of nomination from the applicant's Vestry pledging to contribute financially to preparation for ordination and signed by 2/3 of the Vestry and the clergy in charge and attested by the clerk of the vestry (See Title III. Canon 8. Section 2a (1)) (An interview with the Vestry is required at this time.)

An appointment with the bishop must also be scheduled prior to BACAM. The applicant should call the Office of the Bishop to make an appointment as soon as possible after receiving the invitation to attend BACAM.

The applicant's parish is expected to pay for the cost of the applicant to attend BACAM (\$160-\$200). An e-mail is sent to the clergy in charge of the applicant's parish requesting payment on behalf of the applicant.

### **AT BACAM**

BACAM is an opportunity for applicants to have concentrated time with one another, as well as with those conducting the interviews. A team chosen by the bishop leads the event. The interviewers have hour long, one-on-one conversations with each applicant. The four interviewers and the focus of their interviews are:

**Deacon Interviewer** – A priest or deacon who asks, “Is this a person I can see as a colleague in ministry? What is his /her spiritual life like? What is his /her sense of the Church? What is his/her relationship to authority? What is his/her understanding of obedience? What is his/her understanding of diaconate and the role of a deacon in the Diocese of Ohio?”

**Lay Interviewer** – An experienced lay person and parish leader who asks, “Would I want this person as a deacon? What leadership experiences has he/she had? How does he/she deal with conflict? What is her/his understanding of the relationship between the ordained and the laity?”

**Academic Interviewer** – An academic who asks, “Does this person have the ability to succeed with the academic program and to maintain a life of disciplined learning?”

**Pastoral Interviewer** – A mental health professional who asks, “Is this person emotionally healthy and stable? What are his/her relationships like? Does he/she have the resources to deal with the stress of ministry?”

In addition to the interviews, BACAM includes short talks by some of the interviewers, group discussions and activities, and worship.

The team writes a report to the bishop describing the applicant as fully as they can and offering their sense of how each person's gifts fit into the life of the Church. The report is an evaluation of the suitability of the applicant for ordination.

### **AFTER BACAM**

Following BACAM the applicant schedules another appointment with the bishop. Based on the BACAM report and other materials, the bishop will decide whether or not the applicant should

continue in the process. The bishop will inquire about the applicant's financial resources and discuss the costs of the deacon formation program if the decision is made to continue.

Following a recommendation from the bishop to continue in the process, several evaluations and forms must be completed before a decision is made about postulancy.

1. Psychiatric evaluation: The Office of Christian Vocations will arrange for a psychiatric evaluation with the professional group used by the Diocese for these evaluations. The Diocese will pay for the evaluation. A release form allowing the report to be sent to the bishop must be signed and returned to Office of Christian Vocations. A Behavior Screening Questionnaire provided by the Diocese must be completed and copies given to the bishop and the psychiatrist.

2. Medical evaluation: The evaluation is done by a physician of the applicant's choosing and is paid for by the applicant. The form to be completed will be sent with the information about the psychiatric evaluation.

3. Background check: A background check including a credit check will be initiated by the Office of Christian Vocations. The Diocese of Ohio pays for the background check.

4. Financial statement: The financial statement in Appendix F must be submitted to the Office of Christian Vocations.

If the psychiatric and medical evaluations, the background check, and financial statement are acceptable, the bishop may make the applicant a postulant.

## **Section 4 AS A POSTULANT**

### **COMMISSION ON MINISTRY LIAISON**

A member of the Commission on Ministry will be assigned to each new postulant to be a liaison between the postulant and the COM. This is intended to be an informal relationship that is supportive and an additional point of contact with the Diocese.

The new postulants and their spouses and partners will be invited to a meeting of the Commission on Ministry in the late spring so that the full COM can meet them.

### **DEACON FORMATION PROGRAM**

The deacon formation is typically a three year process, involving one full weekend of study a month with deacon candidates from other dioceses at a central location. Deacon candidates are also assigned a field education parish (see below).

### **FINANCIAL SUPPORT**

The cost of the deacon formation program is ...

Volunteers from within the Diocese of Ohio are available to assist those in the ordination process in analyzing their financial situation. The bishop requires at least one conversation per year with one of these volunteers, which may happen at the seminarian gathering. If you would like

assistance at another time, contact information is available through the Office of Christian Vocations.

### **EMBER DAY LETTERS**

Postulants and candidates for Holy Orders are required to write Ember Day letters to the bishop four times a year. The Ember Days are in September, December, during Lent, and following Pentecost. The letters are an opportunity to tell the bishop about academic and parish experience, and personal and spiritual development. The bishop expects Ember Day letters to be the result of disciplined self-reflection on all aspects of the postulant or candidate's life including significant relationships in the life of the postulant or candidate.

### **ANNUAL COMMISSION ON MINISTRY GATHERING**

Each year in the early spring, all postulants and candidates are expected to attend the gathering with the Commission on Ministry. This is also a time when a visit to home parishes may be arranged. The Diocese will reimburse all travel expenses for the gathering.

### **FIELD EDUCATION**

Field education is a critical piece of the deacon formation process, in which students have the opportunity to function as leaders in a parish setting. The field education placement will be based on conversation between the student and the Canon for Ministry.

- At least once per year, the student and supervisor must fill out a written evaluation of the experience and submit a copy to the Bishop's office.
- Students should reflect on their field education experience in Ember Day letters.
- When choosing a field education site, the student should carefully consider the gaps in their own leadership experience to date. Examples: If the student does not have much experience preaching, a site should be chosen that will provide frequent opportunity to do so. If the student has never served on a vestry, a site should be chosen that will allow them to sit in on vestry meetings.

## **Section 5 BECOMING A CANDIDATE**

Interviews for candidacy will happen at the time of the Commission on Ministry Gathering, usually in the spring of the second year of study. The following documents must be submitted prior to the interviews:

- Evaluation from the Deacon Formation Program
- 
- Field education supervisor evaluation
- Letter addressed to the bishop applying for candidacy which includes the date of admission to postulancy

There will be an interview with representatives of the COM at the Gathering, as well as an opportunity to meet with the bishop. Either before or after the gathering there will be a meeting with the Standing Committee.

An interview with the Vestry of one's home parish is required. A letter of support from the Vestry signed by 2/3 of the Vestry and the clergy in charge and attested by the clerk of the vestry must be submitted to the bishop before candidacy is granted. (See Title III, Canon 8, Sec. 4 (a)) The student is responsible for contacting her/his clergy in charge to request this meeting. If there is no clergy in charge...

After receiving the Commission on Ministry's recommendation, all required documents, and approval from the Standing Committee, the bishop may admit the postulant as a candidate for Holy Orders.

## **Section 6 AS A CANDIDATE**

### **DIOCESAN CONVENTION**

The Diocese expects students to be present at Diocesan Convention which is ordinarily the second weekend in November.

### **(ADD canon III. 6. 5. F)**

## **Section 7 ORDINATION TO THE VOCATIONAL DIACONATE**

Interviews for ordination to the diaconate with the Commission on Ministry and the Standing Committee take place when third-year students attend the COM Gathering. The Standing Committee's role is to certify that all canonical requirements for ordination have been met. The following documents must be submitted prior to the interviews:

- A letter of application to the bishop for ordination to the Vocational Diaconate including the candidate's date of admission to postulancy and candidacy
- Evaluation from the Deacon Formation School
- Evaluation from field education supervisor
- Letter of support from the Vestry signed by 2/3 of the Vestry and the clergy in charge and attested by the clerk of the vestry (no interview is necessary at this time)
- Certificates of completion of sexual misconduct prevention training, training regarding civil requirements for reporting and pastoral opportunities for responding to evidence of abuse, training regarding the national church canons, especially Title IV, and the Church's teaching on racism (see Title III, Canon 8, Section 5.h)

If any of the following were completed more than 36 months prior to the ordination date, the following will be required prior to ordination:

- A second psychiatric evaluation (arranged while seniors are in Ohio for the seminarian gathering)

- A second medical evaluation; the evaluation is done by a physician of the applicant's choosing and is paid for by the applicant, using the form provided by the Office of Christian Vocations.
- A second background check.

The ordination liturgy is arranged by the Bishop's Office. A rehearsal is usually held the evening prior to the ordination liturgy. The Commission on Ministry expects ordinands to take a pre-ordination retreat.

### **PLACEMENT**

As noted on page 5, the placement of the deacon is determined by the bishop. Conversations about placement typically take place in the three or so months prior to ordination.

### **FRESH START**

If possible, newly ordained deacons are encouraged to participate in Fresh Start, a program designed to provide support for newly ordained clergy, clergy new to the diocese, or those clergy in a new position within the diocese. Fresh Start meets approximately six to seven times per year between September and June for support, reflection, and study of topics and issues relevant to transition. There is also an emphasis on the formation of collaborative relationships with the bishop, the bishop's staff, and colleagues.

New clergy will be guided by the Office of Christian Vocations in the selection of a mentor to assist them in their first year of ordained ministry. Typically, the mentor will not be the clergy in charge of the parish where they are serving.

## GLOSSARY

### *Terms you thought everyone knew but you*

**BACAM (Bishop's Advisory Committee on Applicants to the Ministry):** A weekend discernment experience, which follows approval by the Vocations Committee.

**Candidacy:** The second stage of approval for ordination. Follows postulancy. Most postulants are approved as candidates during the spring of their second year of study.

**Commission on Ministry (COM):** Responsible for overseeing the discernment and evaluation process for applicants for ministry and also for the continuing education and wellness of the clergy and lay professionals. Consists of both clergy and lay people who are appointed by the bishop for four year terms.

**Letters of Support:** Letters of support from the vestry are required three times during the ordination process: prior to postulancy, candidacy, and ordination to the diaconate. Each letter must be dated and signed by 2/3 of the vestry and the clergy in charge and must be attested by the clerk of the vestry. (See Title III, Canon 5, Sec. 2 (c))

**Ministry Discernment Day (MDD):** Required of applicants and their clergy in charge. This day is an opportunity to experience various discernment tools and practices, to learn about the vocations of lay persons, lay professionals, deacons, and priests, to talk with others in discernment, and, finally, to get information about the ordination process.

**Parish Discernment Support Group (PDSG):** Three or four members of an applicant's parish, appointed by the clergy in charge, to guide and support the person in the initial stages of discernment.

**Postulancy:** The first stage of approval for ordination. A person may be admitted as a postulant by the bishop, following the recommendation of BACAM (see above), and related medical and psychiatric evaluations and background check.

**Standing Committee:** A diocesan committee comprised of four clerical and four lay members elected by Diocesan Convention that must approve all ordinations to the diaconate and the priesthood.

## **Appendix A**

### **CONSIDERATIONS FOR CLERGY IN CHARGE and Vocation Discernment Committees**

1. Do you know the applicant well enough to make a decision or do you need more time? Are you well enough acquainted with this individual's experience in the Episcopal Church? Have you observed the applicant in a variety of situations?
2. Does this person have a sense of the Holy present in his/her life? How does he/she listen to and attend to the presence of God? What do you know about the person's life of prayer? What are the person's spiritual resources?
3. How do you feel about the applicant? What emotional responses do you have when you meet and talk with this person?
4. How is this person viewed by others in the congregation?
5. Why is the applicant seeking ordination?
6. How does the applicant understand ministry? How does the applicant understand the differences between the functions of ordained persons and lay persons?
7. In your experience with the applicant, does he/she behave in an open, honest, giving and receiving way with other people? How does the applicant listen and take initiative?
8. Does this person have a sense of clear boundaries? Is he/she able to talk about situations in which he/she had to decide: "What's my business and what's not my business?"
9. Is he/she eager to learn, excited about new ideas? Is he/she able to reflect, to ponder, to be challenged?
10. Does this person have a balance of interests in his/her life, or is there a single focus on church?
11. When this person has been in trouble of one sort or another, how did he/she seek help?
12. Are you aware of how the applicant reacts to and relates to persons in authority? How does the person react to conflict?
13. Does this person take time to exercise and to eat and rest appropriately?
14. Does he/she have a sense of the world beyond his/her particular location? Is there a curiosity about what is different and challenging to him/her about other cultures and communities? Is there an overall sense of connectedness with a wider community and the diocese?

15. Are you aware of anything that would significantly enhance or impede the exercise of his/her ordained ministry?

16. Is the applicant sufficiently aware of the financial demands of the deacon formation program ?

Note to clergy in charges working with young applicants:

For help with discernment involving teenagers and young adults, see the document, *Regarding Younger Applicants*, Appendix B.

## Appendix B

### REGARDING YOUNGER APPLICANTS

What is the raw material we are looking for that might help us identify ordained church-leader potential? These comments are focused on young people: teens through mid-late twenties.

- 1) A healthy deacon is grounded in his/her identity as a child of God, nourished by prayer and has a clear sense of vocation and a Rule of Life. Most will have a spiritual director. *Raw Material: A young person who can talk about a sense of the Holy present in their lives. They will have some sort of pattern of nurturing that reality in their lives. They will have sought some sort of mentoring of this aspect of their lives. Do they have a beginning idea of “prayer” – listening to and attending to the Holy in some regular way?*
- 2) A healthy deacon claims retreat time, continuing education time, and space for holy rest. Each person’s pattern will be unique. *Raw Material: Does this younger person know how to be quiet and rest? Is there evidence of a capacity to slow down and to move to an internal space? Does he/she want to learn new ideas, to probe, to question, to be challenged?*
- 3) A healthy deacon shows a balance between work and personhood. Does he/she have a life and interests separate from the institutional church? In other words, the institution does not absorb him/her. *Raw Material: Is there evidence of varied interests that take this young person away from a single focus on church and spirituality? Is there a sense of depth and meaning to these varied interests?*
- 4) A healthy deacon understands wellness. Is there an emphasis on wellness, wholeness, appropriate financial management, and physical health? (Check exercise, weight, and substance use/misuse.) *Raw Material: Does this young person show signs of a willingness to be self-reflective and interested in feedback from others? When they have been in trouble of one sort or another, did they seek some sort of help and use that help? This may happen in a variety of creative ways for young people. Do they look basically physically healthy? Is there a basic sense of order in their lives: money, food, exercise? (Note: This needs to be age-appropriate.)*
- 5) A healthy deacon will tell the truth and expect the same from others. This applies to themselves as well as others. *Raw Material: Is this person direct (in their own style) and willing to tolerate, even seek, that from others? Is this a person not drawn to image and illusion? Keep in mind the normal tendency toward group identity in adolescents and college-age people.*
- 6) A healthy deacon demonstrates good, clear boundaries both professionally and sexually. He/she will have insight on the role of “deacon in community”. *Raw Material: Can this young person talk about situations in which he/she had to hold limits? What kind of situations has he/she encountered in which he/she needed to decide: “What’s my business and what’s not my business?”*

- 7) A healthy deacon functions well in community and is not isolated. He/she will give and receive feedback and information to and from colleagues. The experience of community is attractive and actively sought. There is a reasonable trust level with colleagues and with one or both bishops (i.e. attends diocesan events, will go to the bishop with problems). *Raw Material: Who are trusted friends and supports of this person? Of what "community" do they feel a part? Is he/she open to a creative understanding of community? Who in authority do they trust and have sought for advice and support? Why?*
- 8) A healthy deacon understands that he/she is called to serve in the Diocese of Ohio, not just a particular parish. Does this person know what it means to be part of a larger community, to be an Episcopalian/Anglican? *Raw Material: Does this younger person have a sense of the world beyond his/her particular location? Is there a curiosity about what is different and challenging to him or her about cultures and communities in other places? Is there an overall sense of connectedness with a wider community?*

**Appendix C**

**APPLICATION FOR THE DIACONATE  
Diocese of Ohio**

Please complete this form and return it along with a complete work history and spiritual autobiography (*no more than four pages*) to the Office of Christian Vocations, Diocese of Ohio, 2230 Euclid Avenue, Cleveland, Ohio 44115. This form will be shared with others throughout the discernment process.

Name \_\_\_\_\_ Date \_\_\_\_\_

Mailing Address \_\_\_\_\_

\_\_\_\_\_

E-mail Address \_\_\_\_\_

Telephone (h) \_\_\_\_\_ (o) \_\_\_\_\_

Permanent Address (if different from above) \_\_\_\_\_

\_\_\_\_\_

Date and Place of Birth \_\_\_\_\_

Parish of Membership \_\_\_\_\_ City \_\_\_\_\_

Length of Membership in Parish \_\_\_\_\_

Previous Parish and/or Denominational Affiliations \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Date and Place of Baptism \_\_\_\_\_

Date and Place of Confirmation or Reception into the Episcopal Church \_\_\_\_\_

\_\_\_\_\_

Marital Status \_\_\_\_\_ Spouse/Partner's Name \_\_\_\_\_

Have you been previously married or partnered? Is so, when and to whom? \_\_\_\_\_

\_\_\_\_\_

Names and Ages of Children \_\_\_\_\_

\_\_\_\_\_

Is your family supportive of your plans? \_\_\_\_\_

\_\_\_\_\_

If married or partnered, what plans have been considered for your spouse/partner and family during your education?

\_\_\_\_\_

\_\_\_\_\_

Spouse/Partner's Religious Affiliation, if any \_\_\_\_\_

Have you ever applied for ordination in another Diocese? \_\_\_\_\_

If yes, explain. \_\_\_\_\_

\_\_\_\_\_

How long have you been considering the ordained ministry as a vocation? \_\_\_\_\_

\_\_\_\_\_

What has moved you to seek ordination? Explain *briefly*. Use a separate sheet if necessary.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Have you ever considered the priesthood as a vocation? \_\_\_\_\_

\_\_\_\_\_

High School, Date of Graduation \_\_\_\_\_

\_\_\_\_\_

College, Degree, Major, Date of Degree, Grade Point Average \_\_\_\_\_

\_\_\_\_\_

Graduate Work or Degree, Place and Date of Degree, Grade Point Average \_\_\_\_\_

\_\_\_\_\_

Are you presently enrolled in an educational institution? \_\_\_\_\_

If yes, explain. \_\_\_\_\_

\_\_\_\_\_

Honors and Awards \_\_\_\_\_

\_\_\_\_\_

Continuing Education \_\_\_\_\_

\_\_\_\_\_

Military Service \_\_\_\_\_ Type of Discharge \_\_\_\_\_

Present Occupation/Employer and Date of Employment \_\_\_\_\_

\_\_\_\_\_

Former Occupations/Employers and Dates of Employment

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

List your community, parish, and other activities briefly.

Community/Professional \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Parish \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Interests \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Name three books you have read during the past year \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I give my full permission for this and any other privileged information to be given by the bishop of the Diocese of Ohio to members of the Vocations Committee, the BACAM evaluators (should I be recommended to attend BACAM), psychiatrist, the Commission on Ministry, the Examining Chaplains, and the Standing Committee.

Applicant Signature \_\_\_\_\_

Date \_\_\_\_\_

Clergy Signature \_\_\_\_\_

Date \_\_\_\_\_

## Appendix D

### **FOR THE VOCATIONS Discernment COMMITTEE: AREAS OF DISCUSSION WITH APPLICANT**

Ordained ministry is not an easy life. It presents significant challenges, both emotionally and spiritually. In its sessions with applicants, the Vocations Discernment Committee seeks to form as complete a picture of the person's suitability for that life as possible. The following are topics to be covered, with suggested questions to guide the conversation.

We strongly recommend that the applicant be asked to write a reflection on one of these areas, prior to each meeting. This not only helps deepen the discussion, it also gives the Committee a sense of the person's writing skills.

Please do not feel bound to stick to this order. Questions in the area of emotional maturity, particularly, may be best sprinkled through several sessions.

#### **I Spiritual Awareness**

- A. Having read the applicant's account of his or her spiritual journey, ask follow-up questions:
  - Can you tell us more about ...
  - Then what happened ...
  - Have you ever had another experience like that?
- B. How specific is this person in telling his or her faith story?
  - Can you tell us about a "God-moment" in the last week: a time when you were aware of God's presence or activity?
- C. Is it a cohesive and clear expression of faith?
  - Who is Christ, to you?
  - When has it been hard for you to see God?
  - If someone were to tell you that they have no faith, and don't see why anyone else should, either, what would you say?
- D. Does it sound like a maturing faith?
  - How has your relationship with God changed?
  - Tell us about your prayer life ...

#### **II. Emotional Maturity**

- A. Is the applicant able to reflect on his or her relationship with his or her family of origin?
  - Tell us about your family ...
  - What have you learned from those experiences?
  - (If the picture presented is mostly happy) What is one thing you would change, if you could?

- B. If this person is married, in a committed relationship, or has children: Is the applicant able to reflect on those relationships?
- C. How does that family feel about the applicant's interest in ordination?
- How will your decision to pursue ordination affect them?
  - If you are married, what will be the costs and benefits to your spouse or partner?
  - If you have children, what will be the costs and benefits to them?
- D. Does the person "have a life?"
- Tell us about your friends ...
  - Who do you turn to for support?
  - How do they feel about your interest in ordination?
  - If they are supportive, how is that support expressed?
  - In what activities or community groups were you involved in college?
  - How did those involvements shape you?
  - What kinds of activities or community groups are you involved in right now?
  - How important are they to you? Why?
  - What do you gain from them? What do you bring to them?
  - What else do you do with your leisure time?
  - What restores you?
- E. How does the person understand his or her private life as a reflection of his or her faith?
- How do you understand this question from the ordination service: "Will you do your best to pattern your life in accordance with the teachings of Christ, so that you may be a wholesome example to your people?"
  - What does keeping that vow look like, to you?
- F. Does this person have a sense of humor?
- G. Has this person had to deal with grief?
- Have you ever lost someone you loved?
  - What was that journey like? Emotionally? Spiritually?
  - How would you guide someone else going through it?
- H. How does this person deal with his/her shadow side?
- What would you say are your weaknesses?
  - When have you most been aware of them?
  - How have you dealt with them?

### **III. Vocation to Ordained Ministry**

- A. What is the nature of this person's sense of call?
- When did it begin?
  - Did a specific circumstance provoke it?

- Did someone else suggest it?
  - What is it about being a deacon that draws you?
  - What specific form of ordained ministry is most attractive to you?
  - What aspects of ordained ministry would be hardest or least attractive to you?
  - Who are your role models? Who exemplifies what ordained ministry is all about?
- B. Has the church affirmed it?
- Who else has encouraged you to consider the ordained ministry?
  - In what ways have you felt your sense of call affirmed?
- C. What gifts does the person feel that he or she has to offer the Church?
- Tell us about your strengths ...
  - What specific skills and talents will you bring to ordained ministry?
  - How would they help you be a good deacon ?
  - Tell us about your. limitations and places of growth
  - How do they relate to this sense of call?

#### **IV. Past and Present History of Ministry**

- A. What place has the Church had in this person's life to date?
- In what religious tradition were you raised?
  - If a convert, what drew you to the Episcopal Church?
  - What do you most value about this tradition?
  - What would you like to change about it?
  - What drew you to your current parish?
  - What do you most value about it?
  - What would you like to change about it?
- B. What lay ministries has this person been involved in both inside and outside of the church?
- ?
  - 
  - What ministries have been most satisfying?
  - What experiences have been the most frustrating?
- C. How does the applicant understand the ministry of the laity?
- D. What does the applicant consider to be the difference between lay and ordained ministry?  
What are the similarities?
- E. How does the applicant respond to the question, "What will you do if the Church does not affirm your desire to be ordained?"

#### **IV. Past and Present Leadership Experience**

- A. What is the person's leadership experience?
- How do you understand leadership?

- What experiences of leadership have you had in school or in the workplace?
- What have you learned about leadership?
- What experiences of leadership have you had in the church?
- Have the church experiences been different? If so, how?
- What models have you had of ordained leadership?
- Tell about a difficult decision you've had to make, and how you came to that decision.

#### B. Authority

- Who have been the authority figures in your life?
- How have you responded to parental authority? Work or academic authority? Ordained authority?
- How do you claim authority?
- What authority does the ordained leader have? How have you experienced this?

#### C. Conflict

- How do you usually handle conflict?
- Why do you think you handle conflict in that way?
- Give an example of a conflict that you were a part of? How was it resolved, or not? What did you learn from that experience?

#### D. Financial and Management experience

- Have you had any experience leading and managing people? What is the most difficult part of that for you? What part do you most enjoy?
- What experience do you have developing a budget? Reading and analyzing income statements and balance sheets? If not, how will you get that experience?



3. Please describe the Applicant's past and current history of ministry. Be specific.

4. What is your impression of the Applicant's intellectual, emotional, spiritual, and leadership capacities?

a. Intellectual

b. Emotional

c. Spiritual

d. Leadership

5. Please describe the Applicant's strengths. Be specific using examples.

6. Please describe areas needing development. Be specific using examples.

7. What is your general sense of the Applicant's suitability for ordination?

8. Are there any other factors that you regard as significant?

9. Do you recommend this Applicant for continuance in the process and attendance at the next BACAM?

Yes \_\_\_\_\_ No \_\_\_\_\_ Not At This Time \_\_\_\_\_

Why?

Signed \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Date: \_\_\_\_\_

The Applicant has received a copy of this evaluation. Yes \_\_\_\_\_

Applicant's Signature \_\_\_\_\_

Please return this form to:

Office of Christian Vocations  
Diocese of Ohio  
2230 Euclid Avenue  
Cleveland, Ohio 44115

## Appendix F

### Episcopal Diocese of Ohio PERSONAL FINANCIAL STATEMENTS

These forms must be completed and returned to the Office of Christian Vocations before being granted postulancy and by February 15 of each year thereafter until ordination. The information on this form is for the use of the Bishop and for his designated representative. The designated representative is responsible for reviewing the financial well-being of postulants and candidates on an annual basis.

Name: \_\_\_\_\_

Date Prepared: \_\_\_\_\_

#### NET WORTH STATEMENT

Assets:	Cash (checking accounts)	_____
	Cash (savings accounts)	_____
	Notes (contracts owed to you)	_____
	Certificates of Deposit	_____
	Treasury Bills	_____
	Savings Certificates	_____
	Life Insurance (cash value)	_____
	Money Market Funds	_____
	Precious Metals	_____
	Securities (stocks, bonds)	_____
	Real Estate (market value)	_____
	Vehicles (market value)	_____
	Individual Retirement Plans	_____
	Other	_____
	<b>Total Assets</b>	_____
Liabilities:	Credit Obligations on Purchase	_____
	Credit Card Obligations	_____
	Home Mortgages	_____
	Auto Loans	_____

Personal Loans	_____
Education Loans	_____
Business Loan Obligations	_____
Taxes	_____
Other Debts	_____
<b>Total Liabilities</b>	_____

Net Worth:	Total Assets	_____
	Less Total Liabilities	_____
	<b>Total Net Worth</b>	_____

**CASH FLOW STATEMENT (project for first year of seminary)**

	Monthly	Annual
<b>Income:</b>		
Salary (self and other)	_____	_____
Investment Income	_____	_____
Diocesan support	_____	_____
Parish support	_____	_____
Seminary & other scholarships	_____	_____
Other income	_____	_____
<b>Total Income</b>	_____	_____
<b>Expenses:</b>		
Donations		
Religious	_____	_____
Other charitable	_____	_____
Rent or seminary housing	_____	_____
Food & personal care		
Seminary food plan	_____	_____
Other food	_____	_____
Personal care, misc.	_____	_____
Seminary costs		
Tuition	_____	_____
Books	_____	_____
Clothing	_____	_____

Transportation		
Airfare	_____	_____
Lodging	_____	_____
Car maintenance, license	_____	_____
Car insurance	_____	_____
Fuel	_____	_____
Public transportation	_____	_____
Utilities		
Telephone	_____	_____
Cable TV	_____	_____
Internet Access	_____	_____
Gas	_____	_____
Electric	_____	_____
Water & Sewer	_____	_____
Household		
Maintenance/Cleaning	_____	_____
Household furnishings	_____	_____
Home/renters insurance	_____	_____
Other	_____	_____
Medical		
Insurance	_____	_____
Doctor/Dentist	_____	_____
Medications	_____	_____
Taxes		
Income taxes	_____	_____
Property taxes	_____	_____
Other	_____	_____
Loan payments		
Mortgage payment	_____	_____
Car payments	_____	_____
Student loans	_____	_____
Credit card payments	_____	_____

Personal/other loan payments	_____	_____
Other expenses		
Life insurance	_____	_____
Restaurants	_____	_____
Entertainment	_____	_____
Books, Magazines, Newspapers	_____	_____
Vacation	_____	_____
Children's school expenses	_____	_____
Clothing	_____	_____
Child Care	_____	_____
Child support/alimony	_____	_____
Cash/pocket money	_____	_____
Legal/Accounting fees	_____	_____
All other	_____	_____
<b>Total Expenses</b>	_____	_____
<b>Income less Expenses</b>	_____	_____

If income is less than expenses, how will you balance your cash flow?