

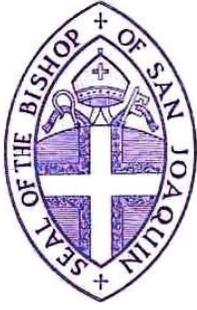
Steps Toward Ordination



Prepared by the Commission on Ministry
of the Diocese of San Joaquin

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THE EPISCOPAL
DIOCESE OF SAN JOAQUIN
THE CENTRAL THIRD OF CALIFORNIA

THE RT. REV. JERRY A. LAMB, BISHOP
THE REV. CANON MARK H. HALL, CANON TO THE ORDINARY

A letter to those who are seeking sacramental ministry as deacons or priests:

Through baptism, Christ calls us to share in His ministry through the church. Some of that ministry occurs in the church and some in the world. Much of that ministry is done by people where they are and does not require special education, formation, or licensing. Ordination requires all three.

This handbook, *Steps toward Ordination*, lists details of the process required within the Diocese of San Joaquin. It is used in conjunction with the *Constitution and Canons of the Episcopal Church* and the *Constitution and Canons of the Diocese of San Joaquin*.

It is the hope of the Commission on Ministry that all who are discerning their vocations and ministries within the church will focus on Christ's ministry and our part in it. Ministry should be present in all times and all places. It is easy to see Ordination as a goal. We hope that you will see it as the starting point for a new phase of ministry. Ministry will happen before ordination and ministry will occur after ordination, though the focus may shift. Thus, we hope that aspirants, postulants, and candidates for holy orders will engage the process as opportunity for growth and formation, rather than check marks on a piece of paper.

It is, however, your responsibility to keep track of the process. You need to make copies of all paperwork for yourself, and see that it submitted in a timely fashion. Your liaison with the Commission on Ministry will help you understand the process, but you must take the steps yourself.

The Commission on Ministry and I seek to support you through the discernment process. That is part of our ministry within the church. May God be glorified as we walk on this path together so that God's work may continue.

+Jerry A. Lamb
Bishop of San Joaquin

Marion Austin
Chair, Commission on Ministry

Introduction

The ministers of the Church are the laity, bishops, priests, and deacons. The Canons of The Episcopal Church in the United States of America describe the requirements for ordination in Title III, and are available on the Internet: http://www.episcopalarchives.org/CandC_2009.pdf

This document describes the procedures under the Canons for those persons considering or seeking Holy Orders in the Diocese of San Joaquin.

Definitions

For purposes of clarity, we use these definitions and terms:

- An applicant identifies an aspirant who has submitted an application, been endorsed by a sponsoring congregation, and received *preliminary* approval by the bishop to enter the process.
- An aspirant identifies a person beginning the process of seeking ordination; one who aspires to ordination.
- The Bishop refers to the Bishop of the Episcopal Diocese of San Joaquin, or the acting Ecclesiastical Authority
- A candidate is a person in the final step before ordination.
- A Check List is a list of requirements. See the Table of Contents.
- A deacon is a member of the clergy whose vocation is as an icon for the Church and the world of the servant ministry of Christ. The Diocese of San Joaquin seeks to avoid using the terms of “vocational” or “permanent” when describing deacons.
- Field Education is an intentional period of learning in a congregational setting that is generally different from the congregation sponsoring the individual for ordination.
- A Form is a required document for the ordination process in the Diocese of San Joaquin.
- A Guideline is advice from the Commission on Ministry in this document.
- A liaison is a member of the Commission on Ministry who provides a person in process with a consistent link.
- A parish includes parishes, mission churches, or a recognized community of faith.
- A postulant is a person in a preliminary step toward ordination.
- A Priest is a member of the clergy whose vocation is as an icon for the Church and the world of what it means to live our lives as an offering to God.
- A rector includes vicar, and other members of the clergy in charge of a community of faith.
- A transitional deacon is a member of the clergy seeking ordination to the Priesthood.
- A vestry includes a bishop’s committee and a council of the laity of a community of faith.

The Mission of the Commission on Ministry of the Diocese of San Joaquin

The Commission on Ministry advises and assists the Bishop

- In the implementation of Title III of the Canons of the Episcopal Church,
- In the determination of present and future opportunities and needs for ministry of all baptized persons, and
- In the design and oversight of the ongoing process for recruitment, discernment, formation, and assessment of readiness for ministry.

The Tasks of the Commission on Ministry

The Commission on Ministry (COM) recommends actions to the Bishop and the Standing Committee. The Commission participates in this process by assisting persons in discernment for ministry and working with them as they follow their path toward their ministry. It meets with individuals as they seek postulancy, candidacy, and ordination.

The Commission works closely with the Standing Committee of the Diocese throughout the ordination process. Members of the Standing Committee serve as liaison to the Commission and regularly attend meetings. Members of the Standing Committee participate in the Ministry Discernment Conference conducted by the Commission.

The Commission advises the Bishop in the discernment of vocations. The Commission guides the formation and training of those studying for the diaconate and the priesthood and recommends to the Bishop the readiness of a candidate for ordination.

The Standing Committee approves candidacy, and prior to ordination, certifies in writing that all canonical requirements have been met and that “there is no sufficient objection on medical, psychological, moral, doctrinal, or spiritual grounds and recommends to the Bishop that a candidate be ordained deacon or priest”. (*Canon III.6.6 (c), Canon III.8.6 (d), and Canon III.8.7(c).*)

In summary, the Commission discerns and helps to prepare individuals for the ordination process. The Standing Committee recommends persons in process to the Bishop for Holy Orders. All persons considering Holy Orders should study *Steps Toward Ordination* with the clergy in their congregation. In addition, the Commission will advise and assist all members of the diocese about the process and answer their questions.

The Commission encourages the ministry of the laity and helps provide appropriate opportunities for discernment for gifts and direction for use of those gifts as ministry in the church and in the world.

Contacts in the Diocese

The web site of the Diocese of San Joaquin is <http://www.diosanjoaquin.org/>

The address for the diocesan office is:

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Process Effective Date

All persons appearing before the COM will follow the process outlined for them by the Commission. In most cases, it will be the process outlined throughout the manual, including the *Day of Discovery* and *Context for Ministry* materials. The COM will make every effort to ensure that individuals are not adversely subject to changes, recognizing that changes to the canons may create some changes in process.

The following is offered as a synopsis of the process. The details are described elsewhere in this manual.

An Overview of Canon 6 and Canon 8 Ordination Processes

Diocese of San Joaquin

The minimum time from acceptance of Application to any Ordination is 18 months.

Italics below indicate identical requirements for Canon 6 and Canon 8.

	Canon 6, Diaconate	Canon 8, Priesthood,
First Steps Aspirant	<i>Confirmed Communicant in good standing. Member of Diocese of San Joaquin parish for 1 year. Begin or continue meeting with a Spiritual Director Participate in the Day of Discovery. Prepare and reflect on a Context for Ministry project. Congregational Discernment Committee recommends Application. Submit Application Packet to the Secretary for Vocations. Meet with the Bishop.</i>	
Applicant	<i>There is no minimum time to be an applicant Attend an initial Interview with Commission on Ministry. Work with your Spiritual Director. Receive a comprehensive psychological examination. Receive a medical examination. Apply for the Discernment Conference. Attend the Discernment Conference.</i>	
Postulant	<i>There is no minimum time to be a postulant. Pursue an approved education program. Participate in spiritual formation, including a spiritual formation group. Continue to work with your Spiritual Director. Commission on Ministry recommends candidacy. Standing Committee recommends candidacy.</i>	
Candidate	<i>There is no minimum time for candidacy. Pursue an approved education program. Continue spiritual formation group. Continue work with Spiritual Director. Updated Comprehensive psychological examination, as needed. Clinical Pastoral Education. Field Education. Participate in anti-racism training. Participate in sexual misconduct prevention training</i>	
	Diaconal Ordination Examination	General Ordination Examination
	<i>Commission on Ministry recommends ordination to the diaconate. Standing Committee recommends ordination to the diaconate.</i>	
Diaconate	<i>Ordination to the diaconate</i>	
		Six or more months serving as a curate.
		Commission on Ministry recommends ordination to the Priesthood.
	Standing Committee recommends ordination to the Priesthood.	
Priesthood	Ordination to the priesthood.	

Note that steps in each category that are listed above are not necessarily in chronological order.

An Overview of the Initial Discernment Process

The steps in the discernment process are basically sequential. Some may be done concurrently. Most people will require more than one year to complete this process. The description is for the standard process. Those in process should follow the steps specifically prescribed by the COM.

1. *Day of Discovery* is a workshop offered by the Diocese. It is open to all persons, but must be taken by aspirants for Holy Orders.
2. *Context for Ministry* – 12-week exploration of ministry study program. Must be taken by aspirants for Holy Orders. Participants create and carry out a *Context for Ministry* project and begin attending regular meetings with a spiritual director. Meetings with a spiritual director will continue throughout the discernment process.
3. After the *Context for Ministry* program is completed, the Rector and the Commission select the Congregational Discernment Committee and the Aspirant begins meeting with the Committee.
4. Once the Congregational Discernment Committee makes a favorable recommendation, the Aspirant submits Form 1 with attachments to the bishop. This application for Holy Orders will be forwarded to the Vocations Secretary.
5. The Aspirant and Rector attend an interview with the Bishop and possibly a representative of the Commission. Upon being approved by the bishop, the Aspirant becomes an Applicant.
6. The applicant and the rector will generally be invited to attend an informal meeting with the members of the Commission.
7. The Applicant completes the Application Packet with the additional required forms. The packet must be received in the diocesan office 60 days prior to the announced dates of the Ministry Discernment Conference.
8. The applicant attends the Ministry Discernment Conference, a set of comprehensive interviews with the members of the Commission and representatives of the Standing Committee.
9. The Commission makes a recommendation to the Bishop concerning each applicant. The Bishop decides whether the applicant will continue in the lay order or become a Postulant for Holy Orders. Each applicant will be notified of the decision by the Bishop.

For the Clergy and Sponsoring Parish

A call to ordained ministry consists of the perceived call of an individual from God and the ratification of that call by the Church community. The local community plays a vital role in the ordination process. Discernment of a call to ordained ministry usually begins in the local congregation. The local community usually knows the individual best. In the Diocese of San Joaquin, discernment of a call to ordained ministry at the congregational level primarily involves the parish clergy, the vestry, and the Congregational Discernment Committee made up of members of the home congregation, with support from members in local congregations. The sponsoring congregation needs to support its applicant throughout the entire process, from before application through its conclusion. The vestry plays a vital role in the entire process and is required to endorse an applicant at each major step in the process. The Commission will provide training guidelines for vestries.

The Role of the Clergy

The rector or priest-in-charge may be the first person a parishioner speaks to about a call to ordained ministry. Considerable dialogue may pass before an individual begins the first formal step toward Holy Orders. During this period, the rector may recommend prayer, spiritual direction, Bible study, special readings, and lay ministry projects appropriate to the order to which an individual feels called. Participation in formal study may be beneficial. Such attendance will not be considered to be either detrimental or beneficial to entering the ordination process. The discernment programs, the *Day of Discovery* and *Context for Ministry*, offered by the Diocese, are required before the initial interview with the Bishop, and are an initial exploration of a call.

The cleric shall make a careful inquiry, in consultation with other leaders of the congregation, into the physical, intellectual, emotional, and spiritual qualifications of the person. Because the clergy usually know both the individual and the nature of ordained ministry, it is important that this inquiry be undertaken with care. Considerable pain and expense for an individual, the congregation, and the diocese can be avoided if a person who is better suited to lay ministry or clearly unsuited for ordained ministry is appropriately guided early in the process.

The qualities the Commission seeks in its applicants are listed in the section on discernment committees, below. An aspirant should be well received by the parish, already have demonstrated leadership in ministry, and possess a strong personal faith that is publicly acknowledged. An applicant should be emotionally mature and be open and willing to explore that call with the leadership of the parish and the wider diocesan community. An aspirant for Holy Orders should be someone that parishioners can envision functioning as a deacon or priest.

Before formally recommending a parishioner to the Bishop as an applicant for Holy Orders, the cleric should verify:

- The applicant has been a communicant in good standing and a leader in the congregation for at least one year.
- The applicant must be confirmed and have a bachelor's degree or the equivalent if seeking the Priesthood.
- The applicant has been in discussion about the call with the rector for a significant time.

- The applicant has completed the *Day of Discovery* and *Context for Ministry* programs offered by the Diocese of San Joaquin or other program of discernment. One of the requirements of the *Context for Ministry* Program is that each participant must design and carry out a ministry project in the Parish or its community.

After verification of the above, the cleric shall write a letter to the Bishop stating that the individual meets canonical requirements and stating why the person should enter into the formal ordination process. (This is an informational letter, since the formal meeting with the bishop to seeking applicant status will not occur until after a Discernment Committee has done its work.) The cleric shall also send written notification to the Chair of the Commission stating that the applicant is ready for a Discernment Committee.

The cleric may assist the parishioner in selecting an appropriate ordained or layperson to serve as the spiritual director. The spiritual director may not be a member of the parish, the Commission or the Standing Committee. Regular meetings with a spiritual director are a required component of the ordination process, beginning with the *Context for Ministry* Program. The Commission wants each person in the ordination process to have someone to talk with who will never report to the Commission or the Standing Committee. As early in the process as possible, when the applicant is ready to share the possibility of a call with others in the congregation, the cleric shall call together a Congregational Discernment Committee.

- Preliminary discussion about a call, See "Qualities We Seek in Ordained Persons"
Arrange for the parishioner to experience a variety of ministry opportunities in the parish.
Send Letter of Recommendation to the Bishop.
- Arrange for the parishioner to begin meeting with the Congregational Discernment Committee. Schedule Vestry Training Session using Commission guidelines.
- Receive the Congregational Discernment Committee Report.
- Schedule Vestry interview with parishioner.
- Complete and sign *Endorsement* (Form 6, *Steps Toward Ordination*)
- Accompany applicant to meet with the Bishop and a Commission member.

The Role of the Sponsoring Parish

If the Diocesan and local Church communities agree that the applicant is called to ordained ministry, the congregation should be prepared to support and encourage the individual actively throughout that journey to ordination. Parish support should include remembering the individual in the Prayers of the People, inviting that person to preach, maintaining communication during the time of preparation for ordination, and includes offering financial assistance. The sponsoring congregation needs to support its parishioner throughout the entire process, from before Nomination through its conclusion.

If the conclusion is that the individual is called to lay ministry, the cleric, vestry, members of the Congregational Discernment Committee, and the Commission should be prepared to support and encourage the person to discover, claim, and train for that ministry.

The Role of the Vestry

The vestry plays a vital role in the entire discernment process. The Canons of the Episcopal Church require the vestry to sign certificates of endorsement several times during the process toward ordination. The vestry is responsible to the whole Church to get to know each applicant and consult with the cleric before signing the certificates.

Part of the discernment process for applicants involves attending a Day of Discovery. This training day would also be beneficial for vestry members so they could understand part of the discernment process. The Commission will provide training specifically for vestries. Before the vestry endorses an applicant, it should carefully review the information from the Congregational Discernment Committee. In addition, it should consult with the cleric. If the vestry endorses the applicant, it should lead and recruit the congregation's support, which will include financial support of each applicant. The degree of financial support will vary depending on the resources of the congregation. It can range from the proceeds of a bake sale to a substantial grant.

- Attend Vestry Training.
- Participate in Vestry Discussion on the Orders of Laity, Deacons, and Priests.
- Receive and review report from Congregational Discernment Committee with the parishioner before the Commission's Ministry Discernment Conference.
- Complete and sign the *Endorsement* (Form 6, *Steps Toward Ordination*)
- Support the postulant throughout his or her process spiritually, emotionally, and financially, as able.

Discernment Steps for the Aspirant

The goal of the ordination process is not that people be ordained and begin a career; rather, the goal of ordination is that the church continues with effective ministry, to the church and to the world. Ordained ministry is only one part of the ministry of the church. Those seeking ordination should already be effective ministers of the church who are now seeking a different path to join in Christ's ministry. Ministry will occur before ordination, during the ordination process, and then, possibly continue as part of the ordained ministry.

As such, the ordination process should be viewed as a discernment process of the most effective avenue of ministry for the individual to join with Christ's ministry. The word "discernment" comes out of middle English, from a word that means "to separate". During the process, different thoughts, feelings, and intuitions are separated and examined, and put back together. From a similar word in Greek, we look at "dia – krisis", through crisis. Crisis here is not trauma, but things out of the ordinary, so we are getting out of the ordinary and looking for the guidance of God in the midst of things.

Most of this discernment will take place in the familiar settings of family and home congregation, especially at the early steps. In ideal settings, the community would recognize gifts and talents and suggest that a person consider seeking Holy Orders. More often, in our current culture, individuals sense a call, and then verify it with the community. As with all other forms of ministry, there are situations where the gifts offered may not be the gifts needed within a community and they may not be received by the community.

First Steps toward Ordained Ministry

Each person seeking ordination in the Diocese of San Joaquin must have been a communicant in good standing and have demonstrated leadership for at least one year in a parish of the diocese. Each person seeking ordination next devotes a year or more for discernment. This includes work with a spiritual director, who can assist in listening to God with the individual. Conversations with the clergy and members of the congregation are also helpful.

While informal conversations with members of the community and clergy may help clarify a sense of vocation (calling), there are two specific steps that those aspiring to Holy Orders need to take at the beginning. They are to attend at a *Day of Discovery* workshop (and completion of the *Context for Ministry* work) and to engage in discernment with a formal Congregational Discernment Committee. The *Context for Ministry* program can help individuals clarify their own sense of ministry, and some people have discovered where their vocation lies without going through an ordination process and being redirected to other ministry.

The first discernment step in the ordination process in the Diocese of San Joaquin is the same for the Diaconate and the Priesthood, as prescribed by the Commission on Ministry. The COM may utilize different discernment tools or processes as situations warrant. The following process is used in several dioceses, including the Diocese of San Joaquin. It formally begins with the *Day of Discovery* offered by the Commission. The twelve-week *Context for Ministry* program directly follows the *Day of Discovery*. The purpose of these programs is to create an environment for interested persons to discover more about the ministry of Christ and how the four orders of

ministry in the Episcopal Church (Laity, Deacons, Priests, and Bishops) complement and support each other. The programs are open to all interested members of the laity, but applicants for Holy Orders must participate in both programs. Development and implementation of a ministry project is an important component of the *Context for Ministry* program and is seen by the Commission as an essential step in the discernment process.

During the *Context for Ministry* program, a participant should begin regular meetings with a spiritual director, if not already doing so. A list of persons willing to serve in this capacity is available from the Diocese. The director may not be the participant's rector, a lay or clerical member of the participant's sponsoring parish, a member of the Commission, or a member of the Standing Committee. These exclusions will enable participants to share their spiritual journeys in confidence. The spiritual director will not report to the Commission or to the Standing Committee. Upon completion of the first step in the discernment process, a person desiring further discernment should contact their rector to discuss the appointment of a Congregational Discernment Committee. This committee will meet regularly with the aspirant to help in discerning the specific nature of God's call to ministry.

The Congregational Discernment Process

The call to ministry is an evolving process that may lead one into uncharted territory and into varieties of service over time. God calls us all to ministry. Our task is to hear the call and to respond. The discernment process is for the whole church, and a significant portion occurs at the Congregational level in the Diocese of San Joaquin. The process takes from one to two years or more. Ideally, discernment committees can be set up on a regional basis, with every congregation providing members to help with discernment. Until that ideal is met, Congregational Discernment Committees will be established, drawing primarily on members from the aspirant's home congregation. Other members of the committee will be appointed from other congregations in the region. These additional members will have received training in establishing discernment groups.

The primary purpose of the Committee is to discern with the Aspirant the call and the claims of the Church. The Committee should also provide spiritual support to the Aspirant. The Committee is one of many groups discerning on behalf of the Church how God calls an applicant to serve the Church, as a member of the Laity, a Deacon, or a Priest.

The Congregational Discernment Committee

The Committee should be comprised of four to seven members, one of whom should be ordained. Some members of the Committee may come from different congregations. Members of the Committee should not be the parish priest, the aspirant's spiritual director, or a member of the Commission on Ministry. The members of the Committee should be active in a parish and be familiar with the roles of the Laity, Deacons, Priests, and Bishops in the wider Church. All members must keep confidences, listen with open minds and hearts, and prayerfully seek and speak the truth with love.

The Committee will meet at least once before meeting with an Aspirant. The Aspirant will meet in person with the Committee a *minimum* of four times within a period of six months or until

consensus has been reached. Additional Committee meetings will be necessary for discussing and writing the report and sharing the decision with the Aspirant. If no consensus is reached in the initial period, then the committee should so report. They may choose to reconvene at a later time for further discernment.

The Congregational Discernment Committee Report

When the Committee completes its discernment, it will meet with the Aspirant to discuss its conclusions concerning that call to ministry. The Committee should have a candid, open, honest, and caring conversation with the Aspirant.

Following this discussion, the Committee will prepare a written report for the Cleric using the format suggested by the Commission. All members should sign the report. If consensus is lacking, the report should so state. Committee members may submit alternative conclusions and recommendations. The report is confidential, and the Cleric must exercise discretion in sharing it. The Commission and the Bishop must receive a summary of the report and the Committee recommendation by 30 days prior to the announced date of the Ministry Discernment Conference.

In making discernment about the calling of the aspirant to Holy Orders, the following list may offer some insights regarding the quality of character being sought.

The Bishop and COM uphold these values when discerning a call to ordained ministry:

- ❖ God calls people both by inward spiritual experience and by the outward beckoning of the community, the Body of Christ.
- ❖ Our process of discerning various calls to ministry is rooted in the history, doctrine, community, and worship of the Episcopal Church.
- ❖ Each individual is treasured and held in the highest esteem.
- ❖ Baptism calls each person to ministry. All orders of ministry -- Laity, Deacons, Priests, and Bishops -- are equally important in carrying out the mission and ministry of Christ's Church.
- ❖ In the discernment process we are to be prayerful, centered in God, patient and yearning for gracious guidance.
- ❖ Conversations concerning discernment are always to be open and honest.
- ❖ For those pursuing ordained ministry, thorough evaluations and recommendations from sponsoring clergy, vestries are essential and vital.
- ❖ Ministries may vary over time and place. The call to ordination is to a vocation which encompasses ministries, local and global.

The Bishop and COM look for these qualities in persons seeking ordination:

- ❖ A deep commitment to follow Jesus Christ as Savior and Lord,
- ❖ A desire to seek God's will,
- ❖ A love of Jesus Christ that can inspire and empower others,
- ❖ A practice of prayerfulness and servant hood demonstrating durable Christian faith and witness,

- ❖ A significant leadership involvement in church activities,
- ❖ Involvement in and a keen awareness of the issues of society,
- ❖ The ability to integrate the needs of the world with the message of the Gospel -- a quality especially important for a Deacon,
- ❖ Commitment to the development of moral character patterned after the life of Christ,
- ❖ A capacity for perseverance in difficulty, a resilience in adversity, and an ability in using life experiences as vehicles for personal growth,
- ❖ Intelligence and imagination with a sound educational background,
- ❖ The ability to learn and a desire to continue to learn,
- ❖ To communicate well,
- ❖ The ability to teach and to give a reasoned account of the Gospel,
- ❖ A desire to help others grow in faith, knowledge,
- ❖ A commitment to listen with sensitivity and understanding,
- ❖ The ability to hear and accept constructive criticism,
- ❖ Initiative and energy; the capacity to be a self-starter and to work hard,
- ❖ A sense of humor and humility,
- ❖ Self-awareness, including a firm grasp of one's personal strengths and weaknesses,
- ❖ A healthy sense of personal and institutional boundaries, including an understanding of the need for discretion and confidentiality
- ❖ The ability to care for and serve others and to be with them in times of crisis,
- ❖ An enjoyment of others; pleasure in human interaction, and a history of getting along well with others and cooperating in team efforts,
- ❖ Breadth of vision and tolerance of others; an ability to relate to people of different personalities and ages and from varying religious, cultural, and economic backgrounds,
- ❖ A demonstrable ability to be a leader, to motivate and enable the ministry of others, and to be an agent of change,
- ❖ An appreciation of the Anglican ethos within the Episcopal tradition.

Application

The next step is for the participant to complete the Application Packet. This lengthy application includes detailed attachments describing many aspects of the aspirant's life. Along with the biographical information, the aspirant will need to submit documentation of showing support from the parish priest and the vestry or bishops' committee in the congregation.

When the Diocesan Office receives the complete Form 1 of the Application Packet, the Bishop will invite the aspirant and rector to an informal meeting that may also include a representative of the Commission. For those seeking the priesthood, the bishop will discuss the aspirant's financial resources for the period of preparation. If the Bishop decides to consider the individual for Holy Orders, the person becomes an applicant. The applicant shall begin to communicate with the Bishop by letter, four times a year, in the Ember weeks, reflecting on the individual's academic experience, and personal and spiritual development.

After this initial meeting with the Bishop, the applicant and rector will be invited to attend an informal meeting with the Commission, and the applicant will then complete the Applicant Packet described in *Steps Toward Ordination*.

This initial process culminates with the applicant attending the Ministry Discernment Conference, which consists of a comprehensive set of interviews with the Commission and the Standing Committee. At the conclusion of the conference the Commission will make its recommendation to the Bishop. The Bishop will decide whether the individual will continue in the lay order or continue with the ordination process. The Commission will be available to support those who continue ministry in the Lay Order. The Commission's document *Steps Toward Ordination* describes in detail the ordination process between the initial meeting with the Commission and the Ministry Discernment Conference.

Aspirant and Applicant Period for Diaconate and Priesthood: Common Steps

1. The applicant's roots are in the home parish. The applicant shall be a communicant in good standing and a leader in the congregation for at least one year. Each applicant must strive to maintain this relationship throughout the ordination process to receive emotional and spiritual support and to furnish information to its leadership. A parish and its rector need to be in continual relationship with the applicant throughout the process to provide knowledgeable endorsements.
 - ❖ **The Commission considers it inappropriate for any postulant or candidate to pursue ordained ministry while concurrently a member of either the Standing Committee or the Commission; however, they may serve as delegates or alternates to the Diocesan Convention.**
 - ❖ **The Commission considers spouses or partners individually if both are seeking ordination.**
 - ❖ **Approval at any stage of the process does not assure any person of ordination.**
2. During the first formal meeting with the Bishop (along with the Rector), the aspirant will be asked to continue to work with a spiritual director, to write a quarterly letter to the Bishop during Ember weeks, and to follow other canonical and Commission requirements. Thereafter the Bishop refers the Applicant to the Commission.
3. The Commission appoints one of its members as a liaison to assist and answer questions the applicant may have about the process; see Guideline 1.
4. Every applicant shall obtain a physical examination. The report of the physical examination shall be on Form 11 provided by the Diocese.
5. The applicant shall seek comprehensive psychological evaluation from an approved agency or person. An evaluation benefits the person in process and the Diocese. An evaluation increases the self-awareness and clarity of each person's strengths, weaknesses, and suitability for ordained ministry. The cost for this evaluation is borne by the person in process. The person in process will sign a release form provided by the Church Pension Fund. The Bishop and the Commission receive a summary of the evaluation using Form 13. The diocese will maintain a listing of approved agencies for this evaluation.
6. The Commission will have started a file in the applicant's name prior to the initial meeting with the Bishop. That file should contain:
 - ❖ A letter of recommendation from the rector of the sponsoring parish.
 - ❖ A recent photograph.
 - ❖ Application for Holy Orders, Form 1.
 - ❖ A list of the applicant's education beyond high school and copies of official transcripts
 - ❖ A description of the outcome of the ordination process if the applicant had previously applied for Holy Orders.
 - ❖ Endorsement of Application for Holy Orders, Form 6.

The applicant shall make certain that the Vocations Secretary receives the Application Packet at least 60 days prior to the announced dates of the Ministry Discernment Conference.

The Application Packet contains:

- ❖ A description of the discernment process and a copy of the summary of its recommendations provided by the Chair of the Congregational Discernment Committee.
- ❖ Application for Discernment Conference, Form 2.
- ❖ Authorization for Background Investigation, Form 10.
- ❖ Medical Examination Report, Form 11, provided by the Diocese.
- ❖ Psychological Evaluation from an approved evaluation agency, Form 13.
- ❖ Evaluations from all theological schools and seminaries, if any. If a degree has been granted, the report should include the institution's assessment of the person's qualifications for ordination.
- ❖ Names and addresses of three persons who agree to serve as references (Form 12). The Bishop or Commission may contact the references indicated on Form 12 at any time during the ordination process. The Commission considers it inappropriate for references to participate elsewhere in this process. The Commission considers it inappropriate for the rector of the parish to be a personal reference.
- ❖ A letter of support from spouse or partner, as applicable.

All Applicants should retain copies of the preceding documents.

7. The Diocese will investigate the background of all persons considering ordination. The Bishop of San Joaquin will request a letter of explanation from the bishop of another diocese that has refused a person admission to candidacy, or who is a candidate in another diocese, or withdrew from the ordination process.
8. When the applicant completes items of Check List 1, the Commission may extend an invitation to attend the Ministry Discernment Conference.
9. The process in the absence of a Rector or Vicar:
 - ❖ Should there be no rector or priest in charge of the parish, a letter of support by a priest of the Diocese acquainted with the person in process and with the parish may sign a letter of support. The letter should also explain the reason for the substitution. With the vestry, this priest may sign the Certificates of Endorsement required during the ordination process, Forms 6, 7, 8 and 9.
 - ❖ At this time, it is imperative for the person in process and members of the vestry to know each other well.
10. After the Discernment Conference, the Commission will make its recommendation to the Bishop. The recommendation will be one of the following:
 - ❖ Postulancy
 - ❖ Postulancy with additional requirements and completion date specified.
 - ❖ Continue in the Lay Order of Ministry with reconsideration at a specified date.

- ❖ Continue in the Lay Order of Ministry.
- ❖ No recommendation at this time.

The Bishop may accept or modify the recommendation of the Commission and will promptly notify each person of the decision concerning them. In addition, the Bishop will send a follow-up letter to the person in process, with copies to the person's rector and to the Commission.

The Commission shall continue to support those recommended for continued ministry in the lay order with the development and enhancement of their ministries. Liaisons will continue to be available to these persons for a mutually agreed term.

**Check List 1: Steps toward the Ministry Discernment Conference
Diocese of San Joaquin**

Name: _____

Parish: _____

Item	Date Recorded by Vocations Secretary
1. Day of Discovery	
2. Context for Ministry	
3. Summary of Congregational Discernment Committee	
4 Application for Holy Orders, Form 1	
4a Spiritual Autobiography with Photo – Attachment A	
4b Attachment B, if needed	
4c College Transcripts, Attachment C listing of Schools	
4d Extracurricular Activities – Attachment D	
4e Employment History – Attachment E	
4f Free Time/Leisure Activities – Attachment F	
4g Civic and Social Clubs – Attachment G	
4h Volunteer/ Community Service – Attachment H	
4i Financial Information, if needed – Attachment I	
4j Recent Books read – Attachment J	
4k Regular periodic/website reading – Attachment K	
4l Letter of Support, from Spouse or Partner – Attachment L	
5a Vestry Endorsement of Nomination, Form 6	
5b Three Personal References , Form 12	
6 Rector and Applicant meeting with Bishop	
7 Rector’s Letter of Recommendation	
8 Admitted by Bishop to Ordination Process as an Applicant	

9 Psychological Evaluation, Form 13	
10 Medical Examination, Form 11	
11 Authorization for Background Investigation, Form 10	
12 Application for Discernment Conference, Form 2	
13 Bishop invites to attend Ministry Discernment Conference	
14 Attended Ministry Discernment Conference	
15 Advanced by Bishop to Postulancy	

The Diaconate: Postulancy and Candidacy

1. Postulancy is the time between Application and candidacy and involves continued exploration of the postulant's call to the diaconate. Candidacy is the time between postulancy and ordination and involves a deeper exploration of the candidate's call to the diaconate. Both periods involve education and formation. There is no time element for any step, but the minimum time between Application for Orders and Ordination is 18 months.
2. The postulant shall meet with the Bishop to discuss education, finances, and other issues. The postulant shall prepare, present, and pursue the program for ordination to the diaconate. Guideline 4 is a Sample Plan for Ordination Training. The Bishop receives the proposed plan for training and, with the assistance of the Commission, specifies the educational course (Canon III.6.5 (a)). The approved course depends upon the previous training and educational history of the postulant, and the ministry needs of the Diocese.
3. The Bishop and the Commission seek to support preparation for Holy Orders.
 - ❖ The Liaison is to be regularly available. Postulants and candidates shall contact the liaison at least quarterly; see Guideline 1.
 - ❖ The Bishop desires regular contact with each postulant and candidate. The postulant and candidate shall write a letter to the Bishop four times each year during the Ember Weeks reflecting upon the experiences and personal and spiritual development. *These are private letters and do not go into the postulant's or candidate's file.*
 - ❖ Postulants and candidates shall continue to meet in an approved manner with their spiritual directors, at least monthly.
 - ❖ Postulants and candidates shall participate in a Spiritual Formation Group; see Guideline 2, and Form 14.
4. The minimal time for ordination to the diaconate is eighteen months from acceptance of Application. There is no minimal time as a postulant or as a candidate.
5. The Bishop may assign the postulant or candidate for a period of intentional Field Education. This assignment may be to any congregation after consultation with the rector.
6. The postulant may apply to the Bishop for candidacy after a period of time in the education and field education process. The request should be in the form of a letter stating the date of admission to postulancy and should include Endorsement of Application for Candidacy (Form 7) signed by the postulant's rector and vestry.
7. The Bishop shall request that the Commission attest to the continuing formation of the postulant and make its recommendation of candidacy to the Bishop. The Commission shall inform the postulant and the Standing Committee of its decision.
8. The Standing Committee shall review the documentation relating to the application for candidacy, interview the postulant and submit a written recommendation to the Bishop.
9. The Bishop may admit the postulant as a candidate.

10. The candidate shall satisfactorily complete a Pastoral Education program approved by the Commission, see Guideline 3. Those candidates who think that they might seek employment as a chaplain in hospitals or other institutions should undergo a formal Clinical Pastoral Education (CPE) program. All candidates shall insure that the program supervisor sends a letter of evaluation to the Bishop. This letter must be available to the Commission in the Candidate's file.

11. The COM Academic Review Committee will conduct, administer, and evaluate the Diaconal Ordination Examinations given to candidates and report the results to the Bishop. The examinations typically take place during the Candidate's final year of study. The examination, as specified by Canon III.6.5(f), includes these areas:

- ❖ Academic studies, including Holy Scripture, theology, and the tradition of the Church.
- ❖ Diakonia and the diaconate.
- ❖ Human awareness and understanding.
- ❖ Spiritual development and discipline.
- ❖ Practical training and experience.

If the candidate's examination is deficient in any area, the candidate shall meet with the Academic Review Committee who will review the candidate's knowledge in the areas found deficient. The Chaplains will recommend to the Commission a remedy for the deficiencies and notify the Commission when the work has been satisfactorily completed.

12. The candidate shall attend workshops in Anti-racism, including the Church's teaching on racism, and Sexual Misconduct Prevention training, including Title IV of the Constitution and Canon of the Episcopal Church and civil requirements for reporting and opportunities for responding to evidence of abuse. (Forms 15 and 16).

13. The candidate shall submit to the Vocations Secretary and retain copies of:

- ❖ Application for Ordination to the Diaconate, Form 3
- ❖ Endorsement for Ordination to the Diaconate, Form 8, from sponsoring rector and vestry.
- ❖ Endorsement for Ordination to the Diaconate, Form 8, from fieldwork rector and vestry.
- ❖ Seminary transcripts and faculty evaluation: A certificate from the seminary or other program of preparation showing the candidate's scholastic record in the subjects required by canons, and giving an evaluation with recommendation as to the candidates other personal qualifications for ordination together with a recommendation regarding ordination to the diaconate. Canon III.6.6(b)4
- ❖ Updated medical and psychological reports if needed. Evaluations must have been done within 36 months of the expected date of ordination.
- ❖ Documentation of fulfillment of Anti-Racism Training, Form 15
- ❖ Documentation of fulfillment Sexual Misconduct Prevention Training/Reporting Requirements, to comply with Title III and IV of the Canons for sexual misconduct prevention, Form 16
- ❖ Certification of Participation in a Spiritual Formation group, Form 14,
- ❖ Pastoral Education evaluation, formal CPE or informal training evaluation, as required.

14. When the items of candidate's file are complete (Check List 2), the Commission will review them and make a written recommendation to the Bishop regarding ordination. The Commission may interview the candidate prior to making its recommendation.

15. The candidate shall make certain all completed documentation is available two months prior to consideration by the Standing Committee. The Standing Committee may interview the candidate. The Standing Committee shall certify to the Bishop that the candidate meets the canonical requirements for ordination to the diaconate, and that there is no sufficient objection on medical, psychological, moral, doctrinal, or spiritual grounds. The Standing Committee writes its recommendation to the Bishop. Then the Bishop shall take action and notify the candidate. No ordination plans shall be made until after the candidate receives the notification from the Bishop.

16. A candidate must be at least 24 years of age when ordained. The candidate shall sign the Oath of Conformity to the Doctrine, Discipline, and Worship of the Episcopal Church in the United States of America in the presence of the Bishop.

17. Following ordination, the Bishop will assign the deacon to a ministry within the Diocese. The initial assignment will usually not be the deacon's sponsoring parish. It is the Bishop's prerogative to make church assignments for deacons.

Check List 2: Steps Toward the Diaconate Diocese of San Joaquin

Name: _____

Parish: _____

	Date Recorded by Vocations Secretary:
Date Approved for Postulancy	
Date Approved for Candidacy	
Date Approved for Ordination	

1. Met with Bishop to discuss process	
2. Bishop approves course of study; Guideline 4	
3. Rector and Vestry endorse candidacy; Form 7	
4. Commission on Ministry recommends candidacy.	
5. Standing Committee recommends candidacy.	
6. Clinical Pastoral Education evaluation received.	
7. Sexual Misconduct Prevention training; Form 16.	
8. Anti-Racism training; Form 15.	
9. Diaconal Ordination examinations successfully completed.	
10. Spiritual Formation Program; Form 14	
11. Preparation program; Certificate of completion.	
12. Preparation (Seminary) program; Evaluation and Recommendation	
13. Preparation program (Seminary); Transcript.	
14. Medical evaluation within 36 months of ordination.	
15. Psychological evaluation within 36 months of ordination.	
16. Application of Ordination; Form 3.	
17. Rector and Vestry Endorsement for Ordination, home parish; Form 8	
18. Rector and Vestry Endorsement for Ordination, field education parish; Form 8	
19. Bishop has received Ember Day Letters	
20. Commission on Ministry recommends ordination.	
21. Standing Committee recommends ordination.	
22. Over age twenty four at scheduled date of ordination:	<input type="checkbox"/> Yes <input type="checkbox"/> No
23. Approved by Bishop for Ordination	

Ordination Arrangements:

Date: _____ Time: _____ Place: _____

The Priesthood: Postulancy Steps

1. Postulancy is the time between Application and candidacy and involves continued exploration of the postulant's call to the priesthood.
2. The postulant shall meet with the Bishop to discuss education, finances, and other factors concerning the process. The postulant shall prepare, present, and pursue the program for ordination to the priesthood. Guideline 4 is a Sample Plan for Ordination Training. The Bishop receives the proposed plan for training, and with the assistance of the Commission, specifies the course for the postulant. The approved course depends upon previous training and education history of the postulant.
3. The Bishop and the Commission seek to support preparation for Holy Orders.
 - ❖ The liaison is to be regularly available to the postulant. Postulants shall contact the liaison at least quarterly.
 - ❖ The Bishop desires regular contact with each postulant. The postulant shall write a letter to the Bishop four times each year during the Ember Weeks reflecting upon the experiences and personal and spiritual development of the postulant. These are private letters and do not go into the postulant's file.
 - ❖ Postulants shall continue to meet in person with their spiritual directors at least monthly.
 - ❖ Postulants shall participate in a Spiritual Formation group; see Guideline 2, and
 - ❖ Form 14.
4. The postulant shall participate in a minimum of one year of field education. The postulant shall verify participation in field education. The purpose of field education is to provide a rich supplement and a variant to the postulant's current parish experience. The postulant shall discuss the specifics of all field education assignments with the Bishop.

A postulant may elect to participate in a second year of field education in a parish or another ministry setting, preferably within the Diocese of San Joaquin. During the second year of field education, the postulant shall work with a lay committee appointed by the rector of the parish. The postulant shall establish communication between the chair of the lay committee and the liaison for the postulant. The rector of the parish and the lay committee shall send a written description and evaluation of the experience of the second field education year to the Vocations Secretary.
5. The minimum time for Ordination to the Priesthood is eighteen months from acceptance of Application. There is no minimum time as a postulant.
6. The postulant must satisfactorily complete the basic unit of Clinical Pastoral Education (CPE) through an accredited CPE program and supervisor. A list of approved programs and supervisors is available on the web site for The Association for Clinical Pastoral Education, Inc., <http://www.acpe.edu>. The postulant shall insure that the CPE supervisor sends a letter of evaluation to the Bishop. This letter must be available to the Bishop from the postulant's file.
7. The postulant shall write a letter to the Bishop requesting candidacy stating the date of admission to postulancy. Enclose Form 7, Endorsement of Application for Candidacy, from both the postulant's sponsoring parish and the field education parish. Two thirds of each vestry and the rector shall sign the endorsement. The Bishop will notify the Commission of the request for candidacy.

8. The postulant is responsible for submission to the Vocations Secretary and for keeping personal copies of all of the following:
 - ❖ Letter to the Bishop requesting candidacy.
 - ❖ Vestry and Rector's Endorsement of Candidacy, Form 7. **Endorsements are required from both the home and the field education parishes of the postulant.**
 - ❖ Evaluation from the seminary or other program of preparation.
 - ❖ Field Education, First Year Evaluation.
 - ❖ CPE Evaluation.
 - ❖ Field Education, Second Year Evaluation (optional).
 - ❖ Certification of Participation in a Spiritual Formation Program, Form 14
 - ❖ Comprehensive Psychological Examination., Form 13
9. When the Vocations Secretary has received all of the items indicated in Check List 3, and they are present in the postulant's file, the Commission will review them and may invite the postulant to meet with them.
10. The Bishop shall request that the Commission attest to the continuing formation of the postulant and make its recommendation of candidacy to the Bishop. The Commission shall inform the postulant and Standing Committee of its decision.
11. The Standing Committee shall review the documentation relating to the application for candidacy, interview the postulant and submit a written recommendation to the Bishop.
12. The Bishop may admit the postulant for candidacy for ordination to the Transitional Diaconate.

Check List 3: Postulancy Steps to the Priesthood
Diocese of San Joaquin

Name: _____

Parish: _____

	Item	Date Recorded by Vocations Secretary
	1. Meeting with Bishop to discuss process	
	2. Program of Preparation developed; Guideline 4	
	3. Evaluation from program of preparation	
	4. Field Education, First Year Evaluation	
	5. CPE Evaluation	
	6. Field Education, Second Year Evaluation (Optional)	
	7. Spiritual Formation Program, Form 14	
	8. Letter to the Bishop requesting Candidacy	
	9. Endorsement for Candidacy from <u>home parish</u> , Form 7	
	10. Endorsement for Candidacy from <u>field education</u> parish, Form 7	
11.	Bishop has received Ember Day Letters	
12.	Commission on Ministry recommendation	
13.	Approved by Standing Committee for Candidacy	
14.	Approved by Bishop for Candidacy	

The Priesthood: Candidacy

A candidate shall continue to communicate with the Bishop and Commission in the same manner as a postulant. A candidate shall continue to participate in spiritual formation and direction in the same manner as a postulant.

1. There is no minimal time for candidacy.
2. The Bishop shall certify candidates for ordination to the transitional diaconate to the General Board of Examining Chaplains of the Episcopal Church. These Examining Chaplains will conduct, administer, and evaluate the General Ordination Examinations (GOEs). In evaluating candidates for ordination to the transitional diaconate, the Commission and the Standing Committee consider the results of the GOEs as a valid instrument in determining “proficiency” under Canon III.8.7.(b5). The Commission will refer any deficiency noted by the Examiners of the GOEs to the Examining Chaplains of the Diocese. The Diocesan Examining Chaplains may reexamine candidates who receive deficiencies in any area and notify the Commission when the work has been satisfactorily completed. **The candidate shall meet the requirements of the Examining Chaplains at least two months prior to scheduled ordination. Failure to do so may result in a delay of ordination.**
3. The Commission may require the candidate to undergo another psychological evaluation with a licensed psychologist or psychiatrist who will send a written report of the examination to the Bishop, Form 13
4. Prior to ordination to the transitional diaconate, each person shall complete Anti-Racism Training, including the church’s teaching on racism, and Sexual Misconduct Prevention Training, including Title IV of the Constitution and Canons of the Episcopal Church (see Forms 15 and 16)
5. The candidate shall be responsible for submission to the Vocations Secretary and for keeping copies of the following:
 - ❖ Application for Ordination to the Transitional Diaconate, Form 4.
 - ❖ Rector and Vestry Endorsement for Ordination to the Diaconate from both the sponsoring parish and from the field education parish, Form 8.
 - ❖ Seminary transcripts and faculty evaluation: A certificate from the seminary or other program of preparation showing the candidate’s scholastic record in the subjects required by the Canons, and giving an evaluation with recommendation as to the candidate’s other personal qualifications for ordination together with a recommendation regarding ordination to the diaconate. Canon III.8.6(c) (4).
 - ❖ Report of Evaluation of Psychological Condition, which shall occur 36 months or less prior to the expected date of ordination, Form 13.
 - ❖ Documentation of fulfillment of Anti-Racism Training, Form 15.
 - ❖ Documentation of participation Sexual Misconduct Prevention Training Form 16.
 - ❖ Certificate of Participation in a Spiritual Formation group, Form 14.
 - ❖ Evidence of competency in historical and contemporary experience of racial and minority groups, and cross-cultural ministry skills, which may include proficiency in a second contemporary language. It is highly recommended that all candidates become fluent in Spanish.
6. When the Vocations Secretary has received all of the items from the candidate indicated on Check List 4, the Commission will review the file and make a written

recommendation to the Bishop. The Commission may interview the candidate before making its recommendation.

7. The candidate shall make certain all completed documentation is available two months prior to consideration by the Standing Committee. The Standing Committee may interview the candidate. The Standing Committee shall certify to the Bishop that the candidate meets the canonical requirements for ordination to the diaconate, and that there is no sufficient objection on medical, psychological, moral, doctrinal, or spiritual grounds. The Standing Committee writes its recommendation to the Bishop. Then the Bishop shall take action and notify the candidate. No ordinations plans shall be made until the candidate receives the notification from the bishop.
8. At the time of Ordination to the Transitional Diaconate, the Candidate must be at least 24 years of age and shall sign in the presence of the Bishop the Oath of Conformity to the Doctrine, Discipline, and Worship of the Episcopal Church in the United States of America.

Check List 4: Candidacy Steps to the Priesthood
Diocese of San Joaquin

Name: _____

Parish: _____

Item	Date recorded by Vocations Secretary
Approved for Candidacy:	
Eligible for Ordination:	

1. Application for Ordination, Form 4	
2. Endorsement for Ordination by Sponsoring Parish, Form 8	
3. Endorsement for Ordination by Field Education Parish, Form 8	
4. Program of preparation transcripts and Faculty Evaluation	
5. Evaluation of Psychological Condition, Form 13	
6. Spiritual Formation Program, Form 14	
7. Anti-Racism Training, Form 15	
8. Sexual Misconduct Prevention Training, Form 16	
9. Evidence of cross-cultural Proficiency, Form 17	
10. Successful Completion of General Ordination Examinations	
11. Commission Recommendation to Bishop and Standing Committee, Guideline 4	
12. Bishop received Ember Day Letters	
13. Standing Committee Recommendation	
14. Approved by the Bishop for Ordination	
15. Over age 24 at Ordination? <input type="checkbox"/> Yes <input type="checkbox"/> No	
16. Ordained Deacon	
17. Date eligible to be Priest	

Diaconal Ordination Arrangements:

Date: _____ Time: _____ Place: _____

The Priesthood: Period of Transitional Diaconate

1. Practical training for the Transitional Diaconate shall normally take place in a parish setting. The deacon normally will not serve in the sponsoring parish. A priest shall provide guidance. A deacon may serve as a mentor, as provided in Title III of the Canons.
2. The combined period of Application, postulancy, candidacy before ordination to the diaconate shall be no less than 18 months. The diaconate shall be a minimum of six months
3. **Two months or more prior to consideration for Ordination to the Priesthood** the deacon shall submit to the Vocations Secretary, and keep copies of:
 - ❖ Application for Ordination to the Priesthood. Form 5.
 - ❖ Endorsement for Ordination to the Priesthood, Form 9 from both the sponsoring parish and the parish where the Transitional Deacon is serving.
 - ❖ Seminary transcripts and faculty evaluation: A certificate from the seminary or other program of preparation, written at the completion of the program of preparation, showing the deacon's scholastic record in the subjects required by the Canons, and giving an evaluation with recommendations as to the Deacon's other personal qualifications for ordination together with a recommendation regarding ordination to the priesthood. Canon III.8.7 (b)(4).
4. The Commission shall attest to the successful completion of the program of formation designed during postulancy and make a written recommendation to the Bishop for ordination to the priesthood, Guideline 4.
5. The Standing Committee will review the file and shall certify to the Bishop that candidate has met the canonical requirements for ordination to the priesthood and that there are no sufficient objections on medical, psychological, moral, or spiritual grounds. The Standing Committee may interview the deacon prior to making its recommendation. The Standing Committee writes its recommendation to the Bishop. Upon receipt of the Standing Committee's recommendation, the Bishop may take order to ordain. No ordination plans shall be made until after the candidate receives the notification from the Bishop.
6. A transitional deacon may be ordained priest only after an appointment to serve in a valid ministry within the jurisdiction of this Church, Canon III.8.7 (e).
7. The ordinand shall sign the Oath of Conformity to the Doctrine, Discipline, and Worship of the Episcopal Church in the United States of America in the presence of the Bishop.

Check List 5: Toward Ordination to the Priesthood
Diocese of San Joaquin

Name: _____

Parish: _____

Item	Date recorded by Vocations Secretary
Approved for Postulancy:	
Approved for Candidacy:	
Date Ordained to the Diaconate :	
1. Date eligible for Ordination to the Priesthood:	
2. Application for Ordination to the Priesthood, Form 5	
3. Endorsement for Ordination, Sponsoring Parish, Form 9	
4. Endorsement for Ordination, Assigned Parish, Form 9	
5. Program of preparation transcripts and Faculty Evaluation	
6. Commission Recommendation Sent to Bishop and Standing Committee	
7. Standing Committee Recommendation	
8. Approved by the Bishop for Ordination	

Priestly Ordination Arrangements:

Date: _____ Time: _____ Place: _____

Guideline 1: For the Commission on Ministry Liaison

Introduction

The Commission assigns one of its members to serve as liaison for a person in the process of seeking Holy Orders. The liaison is to provide the person a consistent link with the Commission, and to facilitate continually the Commission's acquaintance with the person's experience and growth in effective preparation for ordained ministry.

The liaison is not a substitute for the Bishop's pastoral oversight of postulants and candidates, or for their pastoral relationships with their sponsoring rector. The Commission intends to extend those associations of persons in process with the Diocese and to aid the Commission in carrying out its canonical responsibility for assisting the Bishop in the ordination process.

The liaison is not an advocate for the person at stages where the Commission as a whole is adopting recommendations to the Bishop and Standing Committee but may offer relevant information and insights. The liaison is not responsible for assisting any person with the application process, such as furnishing prescribed forms, monitoring documentation, or scheduling interviews. The liaison is to be proactive in reminding the person of the need for continual timely submission of documentation for candidacy and ordination since the Standing Committee must act upon these applications.

Procedures and Expectations

The liaison initiates communication with the person in process as soon as possible after the Commission makes its assignment. Such an assignment may occur at the beginning of the process, or if there is a change in liaisons.

The liaison will inform postulants and candidates that they are required to communicate with their liaison at least once in every calendar quarter, to which liaison should respond.

Personal meetings, letters, telephone calls, and e-mail between the person in process and the liaison are all appropriate. The aim is to build a sense of friendship, support, and understanding.

Before a postulant or candidate meets with the Commission for an interview, the liaison must be familiar with and furnish pertinent information from the file of the person in process. The liaison will prepare a brief summary of the file as a profile of the person for use by the Commission. The Commission may make this summary available to the Standing Committee liaison to assist in its subsequent interviews. The liaison will welcome and introduce the person to the Commission.

The liaison will maintain a file of correspondence including copies of letters sent to the person as well as notes and summaries of other communications. The purpose of this correspondence file kept by the liaison is to avoid inconsistencies or contradictions in information given to the person. If a change in assignment occurs, the retiring liaison will transfer the file to the new liaison.

Whenever a liaison (or any member of the Commission) becomes aware that the postulant or candidate faces personal issues that might affect the path to ordination, the liaison will urge the

individual to seek the counsel of the Bishop and the sponsoring rector.

The liaison should interview the sponsoring rector, the field site rector or supervisor, and the chair of the field site lay committee prior to the Discernment Conference as well as prior to consideration for candidacy. The liaison may request participation by the Commission in this process if needed. The liaison will be in partnership with the rector throughout the process.

Role of the Commission Liaison at the Ministry Discernment Conference

Prior to the Discernment Conference, the liaison will contact the rector and other persons identified to discuss the strengths and areas for needed growth of the applicant.

The prayerful discernment of each Commission member is vital and valued. In preparation for the Discernment Conference, the Commission reviews files for each person seeking Holy Orders as soon as possible after the deadline for submission of the Application Packet and other required documents. All members of the Commission participate in the Discernment Conference. If the liaison or any other member of the Commission believes that there is a question concerning the ability of the person seeking Holy Orders to achieve ordination, such as financial, educational, or employment, this question should be brought to the Commission and the Bishop before the person is invited to attend the Ministry Discernment Conference.

The liaison will note areas of strength and concerns for the person seeking Holy Orders prior to the recommendation to the Bishop at the end of the Discernment Conference.

The liaison will monitor any conditions and stipulations that become part of the Commission's recommendations for the person seeking Holy Orders.

Liaisons will continue to be available to all persons whom the Commission has recommended for continued ministry in the lay order for a mutually agreed term.

Guideline 2: Spiritual Formation Program

Introduction

The ordination process requires spiritual formation. Formation seeks to build on education. Formation recognizes that spiritual direction, daily prayer, Eucharistic participation, retreats, regular physical exercise, ongoing study and reflection of the scriptures, and communal life are all components for a balanced life in ministry. In exploring formation, we recognize that *knowing* Jesus the Christ is different than *knowing about* Jesus the Christ.

The Primates of the Anglican Communion have stated that the formation in holiness, truth, wisdom, spirituality, as well as acquiring knowledge is paramount in Christian formation. Formation of the clergy is vital if they are to be icons to the church and the world of how the whole people of God are to be formed as Christians.

Program

The spiritual formation program is required for everyone seeking ordination in the Diocese of San Joaquin. The objectives of this program are to

- ❖ Inspire theological reflection.
- ❖ Build up covenant relationships.
- ❖ Deepen personal growth.

Formation should include developing a personal rule of life of disciplines to help shape and form the individual life of prayer and awareness of God's presence. All persons in process for ordination are also to create their own spiritual formation groups for group reflection on our life in Christ.

Spiritual Formation Groups are to consist of at least three persons, choose their own leadership, and schedule their own meetings. Meetings should be in person and held as often as possible, but at least once a month. Whenever there is effective committed leadership and participation within a spiritual formation group, it is likely to be more effective. The small group leader may be in the ordination process of the Diocese of San Joaquin or from another diocese or not in the ordination process.

Program Models

There are many existing formats and models for small group spiritual disciplines and formation. They include:

Cursillo Reunion Groups
Gospel-Based Discipleship
Group Spiritual Direction
Renovaré
Spiritual Journey Groups

All groups include components of gathering, reflecting on scripture and its applicability to individual lives, reflecting on a rule of life, prayer for members of the group, and closing rituals. Participants can check with the COM liaison to verify formats and styles, should any questions arise.

Monitoring Spiritual Formation Groups

Commission members, Standing Committee members, faculty members of the seminary, and others who have direct authority in the ordination process, should not directly participate in the spiritual formation program. Postulants and candidates will communicate with their liaison to evaluate the method and process of small groups and report on whether small groups have contributed to preparation for ordained ministry.

Liaisons will respect confidentiality and not ask participants about specific conversations of the small group. Liaisons are to obtain feedback from the members and report to the Commission as to the effectiveness of the spiritual formation program.

Guideline 3: Clinical Pastoral Education Requirements for Deacons

Purpose:

The Clinical Pastoral Education (CPE) program is

- ❖ To provide a program that offers supervised, hands-on training and experience for those entering diaconal ministries.
- ❖ To provide an appropriate setting for confronting and addressing personal areas that can hinder healthy diaconal ministry.
- ❖ To provide exposure to the seemingly hidden world of suffering, poverty, injustice, addiction, and abuse that is a major part of diaconal ministry.
- ❖ An accredited CPE program is required for Postulants for the Diaconate seeking hospital or other institutional employment

How this training differs from CPE for the Priesthood:

- ❖ In addition to a hospital experience, the exposure to a wide variety of situations that both confront and immerse students with human suffering is necessary.
- ❖ Because of the nature of this latter exposure, an accredited CPE program with an accredited supervisor is not necessary if the program and supervisor meet the above goals and have the approval of the Commission.

Requirements:

The requirements for CPE are currently being revised by the Commission on Ministry. Until the revision is completed the CPE requirements will be developed on an individual basis.

Guideline 4: A Sample Plan for Ordination Training

1. Name:
2. Parish:
3. Plan Identification: *(Initial or Revised and its Date. Identify any changes throughout this Plan.)*
4. Career Goal:
5. Relevant Experience and Education:
6. Preparation Needed: *(Identify Education and Internships.)*
7. Time Required:
8. Funding Required: *(Tuition; Relevant Travel; Educational Expenses; Family Expenses; Other.)*
9. Funding Sources: *(If necessary, indicate designated funds.)*
10. Planned Review Schedule:

Attach a Spiritual Autobiography as **Attachment A**, along with a photo less than six months old.

How many years have you resided in the Diocese of San Joaquin? _____

If fewer than two years, use a separate page as **Attachment B** to describe why you relocated.

What is your Parish Church? _____

When did you become a Communicant in your Parish? _____

What is the name of the high school you attended? _____

Where is it located? _____

Are you currently enrolled in an educational institution? Yes No

What is its name? _____

Where is it located? _____

Are you enrolled full time part-time on a leave of absence?

On a separate page as **Attachment C**, please provide the information on each college or university you have attended in reverse chronological order with information:

- Name and Location
- Degree obtained. Please indicate any honors.
- Dates attended.
- Grade Point Average or Letter Grade followed by its scale²
- Attach Transcripts.

List your extra-curricular activities on a separate page as **Attachment D** and indicate whether you participated in high school, college or university, or both. Indicate any leadership position you held.

What is your total number of years of education beyond high school? _____

College or University: _____

Graduate School: _____

² For example, use: 3.9/4.0; or B+ / A, B, C, D, F.

Professional or Technical _____

- What is your work history?
- Never gainfully employed.
 - Currently employed part-time.
 - Currently employed full time.
 - Volunteer
 - Not presently employed.

Using a separate page as **Attachment E**, write a brief chronological account of your work history in reverse chronological order. Please describe any gaps in your work activity. Please include

- the name of your employer,
- a brief description of your activity, including any leadership position you held
- when you began, ended, and the time on each job,
- the reason for the job change,
- what you liked best about this job
- what you liked least about this job

Using a separate page as **Attachment F**, please describe your free-time activities. How often and how long did you engage in each one?

Using a separate page as **Attachment G**, please identify and describe the civic or social clubs of which you are or have been a member:

- Name
- Activity
- When did you participate, and how frequently?
- Did you hold any leadership positions?

Using a separate page as **Attachment H**, please describe the volunteer community service activities, including military reserve or public service reserve, in which you participate:

- Name
- Activity
- When did you participate, and how frequently?
- Identify and describe leadership positions you held.

What is your present marital status

- Single
- Married
- Widowed
- Divorced
- Separated
- Partnered

How many marriages or partners have you had?

- Never married or partnered
- Once
- Twice
- Three or more times.

What is the name of your current spouse or partner?

_____ Began: _____

List your children:

Name:	Date of Birth:	Gender:	Living?

Financial: How do you intend to support yourself and your dependents during your education and training for ordination? Please indicate all those that apply:

- Full time employment
- Part-time employment
- Spouse to work
- Personal Savings
- Scholarship
- Student loan
- Support from Parish
- Support from Diocese
- Gifts
- Help from Family
- Other. Please indicate on a separate page as **Attachment I**.

Do you have any large debts? _____ If needed use a separate page also as **Attachment I**.

Your parents: Please give their address if different from yours, and if not deceased.

Father's Name: _____

Address: _____

City, State, ZIP Code: _____

Mother's Name: _____

Address _____

City, State, ZIP Code: _____

What is the marital status of your parents?

- Marriage intact Father deceased Mother deceased
 Divorced Separated Both deceased

If your parents' marriage ended by separation, divorce, or death, how old were you when this occurred: _____

If either of your parents married again, how old were you when this occurred:

Mother: _____ Father: _____

What is the religious preference of your mother _____, and your father _____?

Siblings: Include and identify yourself and give, in order from oldest to youngest, this information for all of your brothers and sisters:

Name	Date of Birth	Gender	Living?

On a separate page as **Attachment J**, list the books you have read in the last six months.

On a separate page as **Attachment K**, list the web sites, entertainment and movies, newspapers, magazines and other periodicals you have read, attended, or used regularly in the past six months.

Include a letter from your spouse or partner regarding your interest in the ordained ministry and their expectations as **Attachment L**.

Who are three persons with whom you have worked in the Church?

Name ³	Shared Ministry	Telephone	Email

Signature

Date

- Applicant's Attachment Check List:** A B C D E F
 G H I J K L

³ These persons should **not** be those you have listed as references on Form 12.

Enclose your autobiographical statement with emphasis on your spiritual journey and discernment process.

- Enclose **Form 6**, from *Steps Toward Ordination* supporting your application signed by your rector and at least two-thirds of the vestry.
- If you have previously applied for Holy Orders describe its outcome in an enclosure.

Form 2: Application for Ministry Discernment Conference
Diocese of San Joaquin

Name

Application Date

I desire to be considered for Holy Orders in the Diocese of San Joaquin. I am applying to attend the Discernment Weekend to meet with the Commission on Ministry and the Standing Committee to seek postulancy for Holy Orders.

I have submitted all of the documents required for Form 1: Application for Holy Orders and have also submitted additional documents required for the Medical and Psychological testing and an authorization for a background check. I understand that it my responsibility to ensure that the Vocations Secretary has received all required documents before being accepted to the Ministry Discernment Conference.

Signature

Date

Form 3: Application for Ordination to the Diaconate

To: The Commission on Ministry and
The Standing Committee of the Diocese of San Joaquin

I, _____,
hereby make application for recommendation to the Bishop for ordination to the
Sacred Order of Deacons.

My current age is _____

I intend to exercise my ministry as a deacon both in and beyond the Church by:

I do not now intend to seek ordination to the priesthood.

Signature Date

Form 4: Application for Ordination to the Transitional Diaconate ⁴

To: The Commission on Ministry and
The Standing Committee of the Diocese of San Joaquin

I, _____, hereby
make application for recommendation to the Bishop for ordination to the Transitional Diaconate.

My current age is _____

Date admitted to postulancy _____

Date admitted to candidacy _____

Signature Date

⁴ Reference: Canon III.8.6
StepsTowardOrdination

Form 5: Application for Ordination to the Priesthood ⁵

To: The Commission on Ministry and
The Standing Committee of the Diocese of San Joaquin

I, _____,
hereby make application for recommendation to the Bishop for ordination to the Sacred Order of
Priests.

Date ordained to the diaconate: _____

My current age is _____

Signature Date

⁵ Reference: Canon III.8.7 (b) (1)
StepsTowardOrdination

Form 6: Endorsement of Application for Holy Orders

To: The Commission on Ministry and
The Standing Committee of the Diocese of San Joaquin

We, whose names are hereunder written, testify to our belief based on:

- Report of the Congregational Discernment Committee
- Personal knowledge
- Evidence satisfactory to us

that _____ is qualified to enter the Application process for Holy Orders, and we offer the following reason(s) for this belief:

Please use a separate page as an attachment if necessary.

We do furthermore declare that this person is a confirmed adult communicant of this Parish Church in good standing. We are prepared to support this person during the time of preparation prior to ordination. [Canon III.6.2(a) Canon III.8.2(a)]

Rector's Signature	Date
Vestry Signatures	
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Attestation of the Foregoing Certificate

I hereby certify that the foregoing certificate was signed at a meeting of the Vestry of _____ Parish, duly convened at _____ on the _____ day of _____ and the names attached are those of all (or a two-thirds majority of all) the members of the Vestry.

Clerk or Secretary of the Vestry's Signature

Form 8: Endorsement for Ordination to the Diaconate

To: The Commission on Ministry and
The Standing Committee of the Diocese of San Joaquin

We the Vestry of _____ Parish do
certify that, after due inquiry, we are well assured and believe that,

_____ is loyal to the Doctrine, Discipline, and worship of this Church, and does not hold anything
contrary thereto. And moreover, we think this a person worthy to be admitted to the sacred Order
of Deacons.

Rector's Signature Date

Vestry Signatures

Attestation of the Foregoing Certificate

I hereby certify that the foregoing certificate was signed at a meeting of the Vestry of
_____ Parish, duly convened at _____
_____ on the _____ day of _____ and the names
attached are those of all (or a two-thirds majority of all) the members of the Vestry.

Clerk or Secretary of the Vestry's Signature

Form 10: Authorization for Background Investigation

To: The Commission on Ministry and
The Bishop of San Joaquin

I, _____, hereby authorize the Bishop of San Joaquin to conduct a background investigation, including a credit report, from state and federal authorities as well as from private individuals, companies, or agencies. I agree to supply all pertinent information, as necessary, to facilitate completion of this background investigation.

Signature Date

If you request, the Diocese will provide you a copy of your background investigation. Please indicate your choice below:

- I wish to be provided a copy of any written background Investigation.
- I do not wish to be provided with a copy of my background Investigation.

Signature Date

Form 11: Medical Examination

The Church Pension Fund publishes this form. Obtain copies by contacting the office of the Diocese of San Joaquin, P.O. Box 7606, Stockton, CA 95267; telephone (209) 952-0006.

Form 12: Three Personal References

The Commission considers it inappropriate for these personal references to participate elsewhere in this process. Furthermore, the Commission considers it inappropriate for the rector of the sponsoring parish to be a personal reference.

Please print

Reference Name: _____

Address: _____

City, State ZIP Code: _____

Telephone, Daytime: _____

Evening: _____

Mobile: _____

Email: _____

Reference Name: _____

Address: _____

City, State ZIP Code: _____

Telephone, Daytime: _____

Evening: _____

Mobile: _____

Email: _____

Reference Name: _____

Address: _____

City, State ZIP Code: _____

Telephone, Daytime: _____

Evening: _____

Mobile: _____

Email: _____

Form 13: Report of Evaluation of Psychological Condition

To: The Bishop of San Joaquin
Post Office Box 7606
Stockton, CA 95267

An evaluation of _____

When did the examination occur and how much time was involved:

1. Is there any serious maladjustment or limitation of the personality that, in your opinion, would disqualify this person for the ministry of the church?

Yes No

2. Are there any signs in the present behavior of this person that suggest that, in your opinion, this person may become ill under the usual pressures of clerical life?

Yes No

3. What is your impression of the ability of this person to respond adequately and appropriately to the emotional demands placed upon this person by the work of the ordained ministry?

Good Fair Doubtful Poor No comment

4. What is your impression of the likelihood of this person becoming unstable or dysfunctional because of nervous strain engendered by the role of the ordained minister?

Unlikely Likely Probably No comment

_____	_____	_____	_____
Signature of Examiner	License	State	Date
Examiner Name (Print)	_____		
Address	_____		

City, State ZIP Code	_____		
Office Telephone:	_____		

Form 14: Certification of Spiritual Formation Program

This certificate is required both for Candidacy and for Ordination.

To: The Commission on Ministry and
The Bishop of San Joaquin

As Commission Liaison for _____, I am assured of the participation this person in the diocesan spiritual formation program as set forth by the Commission on Ministry of the Diocese of San Joaquin.

Signature

Date

Form 15: Fulfillment of Anti-Racism Training Requirement

To: The Commission on Ministry of the Diocese of San Joaquin
The Bishop of San Joaquin

This certifies that _____ has met
the requirement in Anti-Racism Training by

Attending a workshop at _____ on _____

Or, completed coursework from _____
whose subject is _____

A certificate of completion is attached.

Signature

Date

Form 16: Sexual Misconduct Prevention Training

To: The Commission on Ministry of the Diocese of San Joaquin
The Bishop of San Joaquin

This certifies that _____ has met
the requirement of Sexual Misconduct Prevention Training by

Attending a workshop at _____ on _____

Or, completed coursework from _____
whose subject is _____

A certificate of completion is attached.

Signature

Date

**Form 17: Certification of Competency in Cross-Cultural Ministry Skills
and Second Language Proficiency**

To: The Commission on Ministry and
The Bishop of San Joaquin

This certifies that _____ has demonstrated evidence of competency in historical and contemporary experience of racial and minority groups, and cross-cultural ministry skills. This has been demonstrated through the following classes and methods:

Signature _____ Date _____

Optional

This certifies that _____ has attained liturgical proficiency in two languages, one of which is English, which are appropriate to the various cultures of the Church, in the _____ language through

A demonstration at _____ on _____

Or, indicated in a transcript from _____

Signature _____ Date _____