Name _____ Date Started _____

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Episcopal Diocese of Fond du Lac
# Ordination Process Checklist
## PRIEST (with TRANSITIONAL DEACON)
### Title III Canon 8 of National Canons 2018

*Abbreviations: BP (**BP**); Commission on Ministry (**COM**); Standing Committee (**SC**);*
*Diocesan Office (**DO**); Member of the Clergy exercising oversight (**MC**)*

*Prior to nomination, the person must complete the first circle (**Seeker**)*
*and second circle (**Aspirant**) of the Circles of Light process*

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"The Bishop, in consultation with the Commission, shall establish procedures to identify and select persons with evident gifts and fitness for ordination to the Priesthood." -Title III, Canon 8.1

*REF          PROCEDURE                                                                                                    DATE COMPLETED*

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## NOMINATION

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*8.2(a)*   1. ***Congregation*** nominates ***Aspirant*** using (F1) NOMINATION FORM, signed by at least 2/3   _____
*8.3(a)(1)*      of the members of the Vestry and ***MC***.

- ***DO*** ❑ *confirm **Aspirant** completed first Circles of Light process*
- ***DO*** ❑ *confirm Local Discernment Committee (second Circles of Light) received*
- ***DO*** ❑ *create Google folder /Ordination Process/Personnel Files/LASTNAME, FIRSTNAME*
- ***DO*** ❑ *scan, save to Google drive*
- ***DO*** ❑ *email acknowledgement form received to*      ❑ ***Congregation*** ❑ ***BP*** ❑ ***COM*** *Chair*
- ***DO*** ❑ *file hard copy in cabinet*

*8.2(b)*   2. ***Aspirant*** accepts nomination using (F2) NOMINATION ACCEPTANCE FORM   _____

- ***DO*** ❑ *confirm form is complete*
- ***DO*** ❑ *confirm transcript copies received*
- ***DO*** ❑ *scan, save to Google drive*
- ***DO*** ❑ *email acknowledgement form received to* ❑ ***Aspirant*** ❑ ***BP*** ❑ ***COM*** *Chair*
- ***DO*** ❑ *file hard copy in cabinet*

*8.3(c)*   3. ***BP*** *determine if **Aspirant** refused admission as Candidate in another diocese. If yes, must*   _____
     *receive letter from refusing diocese declaring cause of refusal or cessation before continuing process.*

- ***BP*** *record N/A or date letter received*
- ***DO*** ❑ *file hard copy in confidential cabinet*

   4. ***Aspirant*** *becomes **Nominee** when* (F1) *and* (F2) *finalized*   _____

- ***DO*** ❑ *relabel **Aspirant** file as **Nominee**, move to nominee section*
- ***BP*** ❑ *email **Aspirant***
  - o   *all steps complete*
  - o   *now a **Nominee** for ordination*
  - o   ***DO*** *will contact to arrange one hour in-person interview. Advise if **spouse** and/or **MC** is invited to interview*
  - o   *Complete* (F3) FINANCIAL INQUIRY FORM *and bring to interview*
  - o   *Cc:* ❑ ***Congregation*** ❑ ***DO*** ❑ ***COM*** *Chair* ❑ ***SC*** *President*
- ***DO*** ❑ *print email, file hard copy in cabinet*
- ***DO*** *contact **Nominee** to schedule interview, including **spouse** and/or **MC**, if invited. Remind to bring* (F3) FINANCIAL INQUIRY FORM

*8.3(a)(2)*
*8.3(a)(3)*

5. **BP** interviews **Nominee** in person, explain process, discuss resources available for support _____
through preparation for ordination, determine recommendation to continue.

- **BP** ❏ *give **Nominee** copy of this checklist at interview to use to help outline process*
- **BP** ❏ *email **Nominee** recommendation to* ❏ *continue or* ❏ *not continue process with explanation. Cc:* ❏ **MC** ❏ **COM** *Chair* ❏ **SC** *President* ❏ **DO**
- **DO** ❏ *print email, file hard copy in cabinet.*
- **DO** *If recommendation is not to continue,* ❏ *delete file from Google drive,* ❏ *move file to dormant section*

*8.3(b)*

6. **COM** Chair schedule Discernment Day to evaluate **Nominee** qualifications to pursue _____
program of preparation for ordination.

- **COM** *Chair* ❏ *email **Nominee** Discernment Day date and location including forms to complete*
- **Nominee** ❏ *complete forms, return as directed*
- **COM** *Chair* ❏ *scan, save to Google drive, email* **DO**
- **DO** ❏ *print forms, file hard copy in cabinet*

*8.3(b)*

7. **Nominee** attends Discernment Day _____

- **COM** *Chair prepares evaluation and recommendation report* ❏ *scan, save to Google drive* ❏ *email that report has been saved to* ❏ **BP** ❏ **DO**
- **DO** ❏ *print forms, file hard copy in cabinet*

8. **BP** and **COM** Chair confer to determine if **Nominee** is to ❏ continue or ❏ not continue _____

- **COM** *Chair call **Nominee** and communicate decision to* ❏ *end ordination process or* ❏ *admit as Postulant*
- **COM** *Chair email decision to* ❏ **Nominee** ❏ **MC** ❏ **SC** *President* ❏ **DO**
- **DO** ❏ *print email, file hard copy in cabinet*
- **DO** *If not continuing* ❏ *delete file from Google drive,* ❏ *move file to dormant section*

## POSTULANCY

*8.3(d)*

9. **BP** makes **Nominee** a **Postulant**. _____

- **BP** *mails* (L1) LETTER MAKING POSTULANT *to **Nominee**,
  Cc:* ❏ **MC** ❏ **COM** *Chair* ❏ **SC** *President* ❏ **Dean** *of Seminary*
- **BP** ❏ *record name and date in a Register for that purpose*
- **DO** ❏ *relabel **Nominee** file as **Postulant**, moves to postulant section*
- **DO** ❏ *file hard copy in cabinet.*

*8.3(f)*

*Any **Postulant** may be removed at sole discretion of **BP** with written notice to **Postulant**, **MC**,* _____
***COM**, **SC**, **Dean** of Seminary Postulant may attend*

- **DO** ❏ *file hard copy in cabinet,* ❏ *delete file from Google drive,* ❏ *move file to dormant section*

*8.3(e)*

10. **Postulant** begins Ember Letters reflecting academic experience, and personal and spiritual _____
development. Ember Weeks are week following St. Lucy's Day (Dec 13), First Sunday of Lent,
Day of Pentecost, and Holy Cross Day (Sep 14)

*8.5*

11. **BP** and **COM** work with **Postulant** to develop and monitor a program of preparation _____

- *If not previously obtained a baccalaureate degree, design a program of such additional academic work as may be necessary to prepare to undertake a program of theological education 8.5(b)*
- *take into account the local culture, individual's background, age, occupation, ministry, prior education and learning from life experience 8.5(c) & 8.5(d)*
- *Formation shall include theological training, practical education, experience, emotional development, spiritual formation with subject areas to include The Holy Scriptures; History of the Christian Church; Christian Theology; Christian Ethics and Moral Theology including environmental ethics and theology; Christian Worship according to the use of the Book of Common Prayer, the Hymnal, and authorized supplemental*

*texts; The Practice of Ministry in contemporary society, including leadership, evangelism, stewardship, ecumenism, interfaith relations, mission theology, environmental stewardship and care of creation, and the historical and contemporary experience of racial and minority groups. 8.5(f) & 8.5(g)*

- o *Attending seminary should ensure subject areas are met*
- o *If not attending seminary, formation should take place in community, including other persons in preparation for ordained ministry. Specific detail of learning in subject areas must be documented 8.5(e)*
- • *ensuring pastoral guidance is provided throughout the process*
- • *DO* ❑ *scan plans, save to Google drive* ❑ *email saved to* ❑ *COM Chair* ❑ *file hard copy in cabinet*

**NOTE***: 12. & 13. May be completed any time prior to Diaconal ordination. However, if completed more than 36 months prior to ordination, they must be updated.*

8.5(k)(1)  12  ***DO*** request background check from Oxford Document Management  _____

- • ***BP*** *email notification of receipt to* ❑ ***COM*** *Chair* ❑ ***SC*** *President noting any are of concern and indicating original available to review at diocesan office*
- • ***DO*** ❑ *file hard copy in confidential cabinet* ❑ *pay bill* ❑ *invoice* ***Congregation***

8.5(k)(2)  13.  ***Postulant*** *schedule and complete medical and psychological exams. Cost may be covered by **Postulant** insurance. If financial assistance needed, **Postulant** asks **MC** and then **BP**.*  _____

- • ***Postulant*** *complete* (F4A) AUTHORIZATION TO RELEASE INFORMATION*, provide copies to* ❑ ***DO*** *and* ❑ *doctor conducting medical exam* ❑ *psychiatrist or psychologist conducting psychological exam*
- • ***Postulant*** *complete* (F4B) REQUIRED MEDICAL EXAMINATION *and provide to doctor conducting medical exam, to be completed and returned to **DO***
- • ***Postulant***
  - o *Provide* (F4C) REQUIRED MENTAL HEALTH EVALUATION *to Psychiatrist or Clinical Psychologist conducting psychological exam to be completed and returned to **DO***
  - o *Complete* (F4D) LIFE HISTORY QUESTIONNAIRE *and provide to Psychiatrist or Clinical Psychologist conducting psychological exam. NOT returned to **DO***
  - o *Complete* (F4E) BEHAVIORAL SCREENING QUESTIONNAIRE *and provide to Psychiatrist or Clinical Psychologist conducting psychological exam. NOT returned to **DO***

8.5(l)  14.  ***BP*** receives completed (F4B) REQUIRED MEDICAL EXAMINATION and (F4C) REQUIRED MENTAL HEALTH EVALUATION  _____

- • ***BP*** *email notification of receipt to* ❑ ***COM*** *Chair* ❑ ***SC*** *President noting any areas of concern, indicating originals available to review at diocesan office*
- • ***DO*** ❑ *file hard copy in confidential cabinet*

8.5(h)  15.  ***Postulant*** completes following courses, provides certification to ***DO***  _____

- • *Sexual Misconduct and Abuse Prevention Training*  _____
- • *Constitution and Canons & Title IV Training*  _____
- • *Anti-racism Training*  _____
- • ***DO*** ❑ *scan certification as they arrive, save to Google drive* email saved to ❑ ***COM*** *Chair* ❑ ***SC*** *President* ❑ ***BP*** ❑ *file hard copy in cabinet*

**NOTE***: Reports of all investigations and examinations shall be kept permanently on file by the Bishop and remain a part of the permanent diocesan record.*

16.  ***COM*** Chair and ***SC*** President may schedule optional joint ***COM*** and ***SC*** interview with ***Postulant*** to check in and provide support, often prior to Diocesan Convention.  _____

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## CANDIDACY

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*8.4(a)*   17.   *Postulant* applies to become Candidate for ordination.        _____

- *Postulant* send *BP* letter stating desire to be Candidate for      _____
  ordination to the Priesthood, including date made Postulant *8.4(a)(1)*

- *Congregation* sends *BP* letter of support (FT #2) signed and dated by      _____
  at least two-thirds of the Vestry and by *MC* *8.4(a)(2)*

- *BP* email receipt of letters to ❑ *Postulant* ❑ *MC*

- *DO* ❑ scan, save to Google drive, email ❑ *COM* Chair ❑ *SC* President ❑ file hard copy in cabinet

*8.4(b)*   18.   *COM* considers application to become Candidate        _____

- *COM* review documentation of ordination process

- *COM* report to *BP* ❑ (F5A SUPPORT FOR CANDIDACY) or      _____
  ❑ recommendation not to admit as a candidate

- *DO* ❑ scan, save to Google drive, email ❑ *SC* President ❑ file hard copy in cabinet

*8.4(b)*   19.   *SC* considers application to become Candidate        _____

- *SC* interview *Postulant*, if not done previously      _____

- *SC* review documentation of ordination process      _____

- *SC* report to *BP* ❑ (F5B APPROVAL FOR CANDIDACY) or      _____
  ❑ notice of non-approval for candidacy

- *DO* ❑ scan, save to Google drive ❑ email *COM* Chair ❑ file hard copy in cabinet

*8.4(b)*   20.   *BP* makes *Postulant* a *Candidate*        _____

- *BP* mails (L2) LETTER MAKING CANDIDATE to *Nominee*.
  Cc: ❑ *MC* ❑ *Dean* of Seminary ❑ *COM* Chair ❑ *SC* President

- *BP* records name and date in a Register for that purpose

- *DO* ❑ relabel *Postulant* file as *Candidate*, move to postulant section

- *DO* ❑ file hard copy in cabinet

*8.3(c)* **NOTE** A *Candidate* must remain in canonical relationship until ordination to the Diaconate except, for reasons
acceptable to *BP*, may be transferred to another Diocese upon request, provided the Bishop of receiving
Diocese is willing to accept the Candidate.

- *Candidate* discussed request with *BP*

- *BP* communicates with bishop of proposed receiving diocese to determine willingness.

- *BP* sends letter of transfer to receiving diocese, requesting return letter of acceptance.      _____
  Cc: ❑ *MC* ❑ *Dean* of Seminary ❑ *COM* Chair ❑ *SC* President

- *BP* records transfer in Register

- *DO* ❑ relabel *Candidate* to Trasnfer to _____ Diocese, move to dormant ❑ file hard copy in cabinet

*8.3(d)* **NOTE** Any *Candidate* may be removed at the sole discretion of the *BP* with written notice of removal    _____
to *Candidate*; *MC*; *COM* Chair, *SC* President; *Dean* of Seminary Candidate may attend

- *DO* ❑ file hard copy in cabinet ❑ delete file from Google Drive

*8.5(i)*   21.   *Candidate* continues Ember Letters reflecting academic experience, and personal and      _____
spiritual development. Ember Weeks are week following St. Lucy's Day (Dec 13),
First Sunday of Lent, Day of Pentecost, and Holy Cross Day (Sep 14)

## ORDINATION AS DEACON (Transitional)
❑ *at least 24 years of age 8.6(b)*

*8.6(c)*   22.   Application requesting ordination as a Deacon                              _____

- ***Candidate*** *send letter to **BP** requesting ordination as a Deacon*                    _____
  *under Canon III.8 8.6(c)(1)*
- ***Congregation*** *send **BP** letter of support* (FT#3) *signed and dated by*          _____
  *at least two-thirds of the Vestry and by **MC** 8.6(c)(2)*
- ***BP*** *email receipt of letters to* ❑ ***Candidate*** ❑ ***MC***
- *Seminary send certificate to **BP** showing Candidate's scholastic*                _____
  *record in subjects required by Canons, and giving an evaluation with recommendation*
  *as to Candidate's other personal qualifications for ordination together with*
  *recommendation regarding ordination to Diaconate under this Canon 8.6(c)(4)*
- ***DO*** ❑ *scan, save to Google drive, email* ❑ ***COM*** *Chair* ❑***SC*** *President* ❑ *file hard copy in cabinet*

*8.5(k)*   23.   If medical exam, psychological exam, background check completed more than 36 months   _____
            earlier, must update

*8.6(c)(5)* 24.   ***COM*** considers request for ordination as a Deacon                         _____

- ***COM*** *consider recommendation to ordain a Deacon*                          _____
- ***COM*** *report to **BP*** ❑ (F6A) RECOMMENDATION FOR ORDINATION AS A DEACON) *or*
  ❑ *recommendation not to ordain as Deacon*
- ***DO*** ❑ *scan, save to Google drive* ❑ *email **SC** President* ❑ *file hard copy in cabinet*

*8.6(d)*   25.   ***SC*** considers request for ordination as a Deacon                         _____

- ***SC*** *may interview **Candidate**, if not done previously*                       _____
- ***SC*** *review documentation of ordination process*                          _____
- ***SC*** *report to **BP*** ❑ (F6B) CONSENT FOR ORDINATION AS A DEACON *or*          _____
  ❑ *do not consent for ordination as Deacon.*
- ***DO*** ❑ *scan, save to Google drive* ❑ *email **COM** Chair* ❑ *file hard copy in cabinet*

*8.6€*    26.   ***BP*** decides on request to ordain as a Deacon                            _____

- ***BP*** *mail* (L3) LETTER APPROVING ORDINATION AS DEACON *to **Candidate**.*
  *Cc:* ❑ ***MC*** ❑ ***Dean*** *of Seminary* ❑ ***COM*** *Chair* ❑ ***SC*** *President*
- ***DO*** ❑ *file hard copy in cabinet*

*8.6(e)*   27.   The ***Candidate*** may then be Ordained to the Diaconate                    _____

## ORDINATION AS PRIEST

❑ *Length as Deacon, at least six months;*
❑ *At least 18 months from acceptance of nomination;* ❑ *At least twenty-four years of age*

*8.7(b)*    28.    Application to request ordination as a Priest                                    _____

- ***Deacon*** *send letter to* ***BP*** *requesting ordination as a Priest including*        _____
  *dates of admission to Postulancy and Candidacy and ordination as a Deacon under Canon III.8* *8.7(b)(1)*

- ***Congregation*** *send* ***BP*** *letter of support* (FT #4) *signed and dated by*        _____
  *at least two-thirds of the Vestry and by the* ***MC*** *8.7(b)(2)*

- ***BP*** *email receipt of letters to* ❑ ***Candidate*** ❑ ***MC***

- *Seminary send certificate to* ***BP*** *written at completion of program of*        _____
  *preparation, showing Deacon's scholastic record in subjects required by Canon, and giving evaluation with*
  *recommendation as to Deacon's other personal qualifications for ordination together with recommendation*
  *regarding ordination to Priesthood* *8.7(b.4)*

- ***DO*** ❑ *scan, save to Google drive, email* ❑ ***COM*** *Chair* ❑ ***SC*** *President* ❑ *file hard copy in cabinet*

*8.7(a)(3)* 29.    If medical exam, psychological exam, background check completed over 36 months        _____
                ago, must update

*8.7(b)(5)* 30.    ***COM*** considers request for ordination as a Priest                              _____

- ***COM*** *consider successful completion of the program of formation*        _____

- ***COM*** *report to* ***BP*** ❑ (F7A STATEMENT ATTESTING TO COMP-        _____
  LETION OF FORMATION *or* ❑ *recommendation not to ordain as Priest*

- ***DO*** ❑ *scan, save to Google drive* ❑ *email* ***SC*** *President* ❑ *file hard copy in cabinet*

*8.7(c)*    31.    ***SC*** considers request for ordination as a Priest                              _____

- ***SC*** *review documentation of ordination process*        _____

- ***SC*** *report to* ***BP*** ❑ F7B CONSENT FOR ORDINATION AS A PRIEST *or*        _____
  ❑ *do not consent for ordination as Priest*

- ***DO*** ❑ *scan, save to Google drive* ❑ *email* ***COM*** *Chair* ❑ *file hard copy in cabinet*

*8.7(d)*    32.    ***BP*** decide on request to ordain as Priest                                    _____

- ***BP*** *mail* (L4) LETTER APPROVING ORDINATION AS PRIEST *to* ***Deacon***.
  *Cc:* ❑ ***MC*** ❑ ***Dean*** *of Seminary* ❑ ***COM*** *Chair* ❑ ***SC*** *President*

- ***DO*** ❑ *file hard copy in cabinet.*

*8.7(e)*    33.    The ***Deacon*** may then be Ordained to the Priesthood                          _____

*Form revised January 2019*