Name _____ Date Started _____

Ordination Process Checklist
DEACON

Title III Canon 6 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*

"The Bishop, in consultation with the Commission, shall establish procedures to identify and select persons with evident gifts
and fitness for ordination to the Diaconate." -Title III, Canon 6.1

REF	PROCEDURE	DATE COMPLETED

NOMINATION

6.2(a)
6.3(a)(1)
1. ***Congregation*** nominates ***Aspirant*** using (F1) NOMINATION FORM, signed by at least 2/3 _____
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*

6.2(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*

6.3(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 conference. Advise if **spouse** and/or **MC** is invited 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***

6.3(a)(2)   5.   ***BP*** confers with ***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*

6.3(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*

6.3(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

6.3(d)   9.   ***BP*** makes ***Nominee*** a ***Postulant***.   _____

- ***BP*** *mails* (L1D) LETTER MAKING POSTULANT *to **Nominee**, Cc:* ❏ ***MC*** ❏ ***COM*** *Chair* ❏ ***SC*** *President* ❏ ***Director*** *of program of preparation*
- ***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.*

6.3(f)   *Any **Postulant** may be removed at sole discretion of **BP** with written notice to **Postulant**, **MC**,*   _____
COM, ***SC***, ***Director*** *of program of preparation*

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

6.3(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)

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

- ***BP*** *may assign to any congregation of the Diocese or other community of faith after consultation with **MC*** *6.5(b)*
- *take into account the local culture, individual's background, age, occupation, ministry, prior education and learning from life experience* *6.5(c) & 6.5(d)*
- *Subject areas are to include academic studies including, The Holy Scriptures, theology, and the tradition of the Church; Diakonia and the diaconate; human awareness and understanding; Spiritual development and discipline; Practical training and experience..* *6.5(f)*
- *Take place in community, including other persons in preparation for ordained ministry. Specific detail of*

learning in subject areas must be documented 6.5(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.

6.5(j)(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*

6.5(j)(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*
  - *Provide* (F4C) REQUIRED MENTAL HEALTH EVALUATION *to Psychiatrist or Clinical Psychologist conducting psychological exam to be completed and returned to DO*
  - *Complete* (F4D) LIFE HISTORY QUESTIONNAIRE *and provide to Psychiatrist or Clinical Psychologist conducting psychological exam. NOT returned to DO*
  - *Complete* (F4E) BEHAVIORAL SCREENING QUESTIONNAIRE *and provide to Psychiatrist or Clinical Psychologist conducting psychological exam. NOT returned to DO*

6.5(k) 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*

6.5(g) 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.

CANDIDACY

6.4(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 6.4(a)(1)
- **Congregation** *sends* **BP** *letter of support* (FT #2) *signed and dated by*   _____
at least two-thirds of the Vestry and by **MC** *6.4(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*

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

- **BP** *mails* (L2D) LETTER MAKING CANDIDATE *to* **Nominee**.
Cc: ❏ **MC Director** *of program of preparation* ❏ **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*

6.4(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*

6.4(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*

6.5(h)   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 (Vocational)

❏ *at least 18 months after acceptance of nomination;* ❏ *at least 24 years of age* *8.6(a)*

6.6(b)   22.   Application requesting ordination as a Deacon   _____

- *Candidate* send letter to *BP* requesting ordination as a Deacon   _____
  under Canon III.8 *6.6(b)(1)*
- *Congregation* send *BP* letter of support (FT#3) *signed and dated by*   _____
  at least two-thirds of the Vestry and by *MC* *6.6(b)(2)*
- *BP* email receipt of letters to ❏ *Candidate* ❏ *MC*
- Certificate from preparation program 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 *6.6(b)(4)*
- *DO* ❏ *scan, save to Google drive, email* ❏ *COM* Chair ❏*SC* President ❏ *file hard copy in cabinet*

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

6.6(b)(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*

6.6(c)   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* ❏ (F6BD) 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*

         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*

6.6(d)   27.   The *Candidate* may then be Ordained to the Diaconate   _____