

**EPISCOPAL DIOCESE OF NORTH CAROLINA
PROCESS LEADING TO ORDINATION TO THE VOCATIONAL DIACONATE**

This document outlines the process by which the call to ordination as a vocational deacon is supported and endorsed, discerned and formed in the Diocese of North Carolina.

- **ELIGIBILITY AND DISCERNMENT**
 - In congregation before March 1: Conversations with Sponsoring Presbyter and Vestry, Nomination to the Diocesan Bishop and Bishop Suffragan.
 - In congregation before June 1: Parish Discernment Committee
 - At Diocesan Level by Aug. 15: Submit forms, examinations; meet with Bishop Suffragan
- **ENTERING THE DISCERNMENT AND FORMATION PROCESS**
 - Meetings with COM-D (Committee on Ministry for the Diaconate)
 - Contact person from COM-D
- **ACADEMIC PREPARATION IN CORE THEOLOGICAL AND CANONICAL SUBJECTS**
- **INTERNSHIP AND RELATED DISCERNMENT ACTIVITIES**
 - Departing letter to sponsoring congregation, evaluations, interviews for Postulancy
- **FORMATION PROGRAM YEAR, DISCERNMENT TOWARD ORDINATION, AND BEYOND**
 - CPE formation program (Clinical Pastoral Education)
 - Candidacy (6 months prior to ordination): approval from sponsoring congregation
 - Meetings with COM-D and Standing Committee
 - Approval for Ordination (second meeting with COM-D and Standing Committee)
 - Formation following ordination

The following outline details these steps.

I. INITIAL STEPS: ELIGIBILITY AND DISCERNMENT

A. IN THE CONGREGATION PRIOR TO MARCH 1

1. The individual meets with the Sponsoring Presbyter (Priest) of the congregation in which he or she has been an active confirmed communicant for at least one year (preferably two or more). They have a minimum of two conversations in which they review the ordination process. The following items are discussed:

- The Bishop's statements regarding the needs of the Diocese
- The qualifications of a deacon, including those set forth in Canon III, 6 and 7 of The Episcopal Church
- Eligibility based on age (must be ordained by age 70 in order to serve 2 years before mandatory retirement age of 72)
- The nominee's call to the Diaconate and the grounding of that call in the life and witness of the Episcopal Church.

The Sponsoring Presbyter discusses the individual's physical and spiritual health, including the importance of having a spiritual director. He/she reviews with the individual the financial obligations attending the ordination process, including the fee due to the diocese for the initial psychological evaluations, academic courses and Formation Program. (See Addendum A.) *Note: It is the responsibility of the Sponsoring Presbyter, the congregation, and the nominee to work together to meet these costs. [See Canon III, 6.2(a)(1)] The Diocese has scholarship funds that are handled confidentially between the individual and School of Ministry Director. This scholarship support is available to the individual throughout their formation, including financial support for a spiritual director.*

2. If the Sponsoring Presbyterian is convinced of the appropriateness of seeking further discernment, the name of the person is sent to the Diocese by March 1. At this time the individual becomes a Nominee. *The required nomination form is available on-line at: www.episdionc.org. Click on "Diocese/Ordination Process/Ordination to the Diaconate."*

B. IN THE CONGREGATION PRIOR TO JUNE 1

1. At any time after the second conversation between the Nominee and the Sponsoring Presbyterian, but no later than March 1st, the Sponsoring Presbyterian convenes a Parish Discernment Committee (PDC). At the initial PDC meeting, a member of the Committee for the Diaconate (referred to as COM-D), which is a committee of the Commission on Ministry, must meet with them to answer questions related to the formation/ordination process, go over PDC guidelines, and clarify their tasks. The Nominee meets with the PDC 4-5 times. During this time, the Nominee writes a spiritual autobiography and shares it with the PDC. Instructions for writing the spiritual autobiography are in the PDC guidelines. Following these meetings, the PDC produces a written report that is reviewed with the Nominee.

2. The PDC Convener and the Nominee meet with the Vestry. If at least 2/3 of the Vestry is in agreement with the assessment of the PDC, they sign a certificate of support for the nominee. The ongoing responsibility of Vestry and guidelines are discussed with the Nominee. These guidelines for the Vestry are available on the diocesan website.

3. If the PDC report has favorably determined the Nominee's intellectual, moral, emotional, physical and spiritual qualifications, and at least 2/3 of the Vestry members sign the certificate supporting the Nominee, the Sponsoring Presbyterian writes a letter to the Bishop Suffragan describing the Nominee's call to the Diaconate, including the Nominee's spiritual life and development and activities in the congregation. The Sponsoring Presbyterian includes a copy of the PDC's report, the certificate from the Vestry and the Nominee's spiritual autobiography with the letter.

NOTE: THIS LETTER AND ACCOMPANYING DOCUMENTATION ARE DUE AT THE DIOCESAN OFFICE OF THE BISHOP SUFFRAGAN IN GREENSBORO (301 N. Elm St., Ste. 308C, Greensboro, NC, 27401) NO LATER THAN JUNE 1.

C. AT THE DIOCESAN LEVEL

1. Nominees whose names have been submitted by March 1 and who have completed all the steps in section B (above) by June 1 will receive a packet of forms and information from the diocese.
2. By August 15, Nominees must complete the following steps and send results to the Greensboro Diocesan office:
 - a. Complete biographical data sheet;
 - b. Obtain transcripts from all colleges and graduate or professional schools attended;
 - c. Undergo a complete physical examination (this may be done by the Nominee's own physician, but must be reported using the canonical form);
 - d. Send requested fee and release form (see information packet) to diocese and undergo psychological examination with one of the psychologists chosen by the Bishop Suffragan for such examinations.
3. In September the Nominee will be invited to meet with the Bishop Suffragan for an individual interview. By late September, the Bishop Suffragan will notify Nominee whether she or he has been

accepted as an Intern. If the Nominee is not accepted as an Intern, the Bishop Suffragan will direct him or her to other ministries.

4. Upon receipt of this notification, the Intern will send a letter to the Bishop Suffragan, accepting status as an Intern. This dated letter becomes part of the official record.

II. ENTERING THE DISCERNMENT AND FORMATION PROCESS

Prior to an Intern Orientation Meeting in late October with the Committee on Ministry for the Diaconate (COM-D), its members receive copies of all paperwork for each Intern. The COM-D makes internship placements in consultation with the Bishop Suffragan, and a COM-D contact person is assigned to the Intern (see below). The intern then meets with COM-D members to discuss the internship and related discernment activities.

The COM-D contact person's role is to shepherd the individual through the entire formation process. The intern and COM-D contact person are expected to meet regularly; the intern is required to initiate the meetings. Interns must communicate with their contact person at least 3 times during the internship and quarterly thereafter until acceptance for ordination. Meetings can be face-to-face, via video conferencing, or telephone. At least one of these meetings must be face-to-face during each stage of the individual's formation (the stages are Internship, Postulancy, and Candidacy). Email communication is encouraged anytime during formation process.

During the formation process the COM-D contact person submits to the whole COM-D three separate, brief, written reports about interactions with their assigned individual. Each report coincides with a different stage of formation. Before submission, the contact person discusses the report with the individual. This report becomes part of the individual's official record.

III. ACADEMIC PREPARATION IN CORE THEOLOGICAL AND CANONICAL SUBJECTS

The Examining Chaplains will review transcripts, and if necessary, meet with Interns to determine what further preparation in the subjects of Old and New Testaments, Church History and Anglican and Episcopal Church History is required of the Intern. The Diocese provides courses in each of these areas of study to enable Interns to meet these requirements. In addition, each person must participate in Anti-Racism Training and Safe Church Training (levels I and II). Any and all courses may be taken concurrently with the internship, may be taken as a Nominee or done as a dedicated period of preparation before entering the CPE-based formation program. In all cases, satisfactory completion of preparation in these subjects is a prerequisite for entering the CPE-based Formation Program Year.

IV. INTERNSHIP AND RELATED DISCERNMENT ACTIVITIES

1. Departure from sponsoring congregation for internship

Interns are assigned to a different congregation than their sponsoring congregation. Before beginning the internship, the intern writes a letter of departure to the members of their sponsoring congregation: where they are going and why; what the members of the church mean to the intern; what the discernment process means to him/her and their family, including whether they will be attending church in their home parish; asking for the congregation's continued support through prayer. This letter should appear in various communication vehicles at the church and definitely more than one (i.e., regular newsletter, a bulletin insert, weekly email).

2. Internship

A ten-month part-time internship incorporates dual ministry experiences, both within the parish and in its

outreach/social concern ministries. The intern prepares a written Agreement with the assistance of, and in consultation with, the clergy supervisor as to specific goals and activities during the internship. The intern will send copies of the Agreement (signed by the intern and the supervisor) to the Bishop Suffragan and the Chair of the COM-D by **January 15th**.

Interns meet bi-weekly with their parish supervisor(s), to reflect upon both of these ministry experiences and how his/her call to ordained ministry is or is not confirmed by the experience. The intern will also communicate at least 3 times during the internship with the assigned contact person from the COM-D. The parish supervisor is welcome to talk with the COM-D contact person with any questions regarding the internship and its role in the individual's formation and/or any concerns regarding the intern.

In addition to meeting with parish supervisor, it is recommended that the supervisor assist the intern in forming a group of up to five parishioners who can meet with the intern from time to time to provide feedback on the internship experience and to serve as a lay guidance and support committee for the intern.

Interns attend an overnight retreat for spiritual reflection, refreshment, and relationship building.

3. Reports and Self-evaluation - due by **October 15**

- COM-D contact person submits a brief report about his/her conversations with interns.
- Interns write a brief reflection, not to exceed 2 pages, double-spaced. The purpose of this reflection is to explore their inner awareness of their call to the diaconate based on the outer experience of the internship. This theological reflection must include: how has internship supported their call to the diaconate as he/she understands it? How has that understanding changed during the internship? How has the intern seen God at work in them?
- Intern supervisors write a one-to-two page evaluation, discussing the Intern's activities in that setting and including comments about their perceptions of the Intern's discernment of call to – and fitness for – diaconal ministry.

At the end of the internship, Interns must schedule a meeting with their sponsoring parish presbyter and vestry to check in and reflect on their experience with their internship and on the completion and significance of other elements of this discernment phase, i.e., academic study and spiritual formation.

4. Meeting with COM-D and Interview with Bishop

Interns attend a meeting with the COM-D in October in which the members are divided into small groups. Each group has a wide-ranging series of questions they pose related to the intern's ongoing formation and sense of call. These questions are not given to the intern in advance.

Follow-up phone or in-person interviews with the Bishop Suffragan are scheduled, at which she will inform the Intern of her decision to grant Postulancy or direct them to other ministries.

5. Postulancy

All Postulants are required by Canon III, 6e to send a quarterly Ember Day letter to the Bishop Suffragan, reflecting on their formation experiences to date and their personal and spiritual development. At least quarterly communication with the COM-D contact person is expected to continue; the contact person and the Postulant are each responsible for maintaining this regular contact.

V. FORMATION PROGRAM YEAR, DISCERNMENT TOWARD ORDINATION, AND BEYOND

1. Formation Program

After the completion of the internship program and the theological prerequisites, the core formation as a deacon will be a Clinical Pastoral Education (CPE)-based program in which Postulants will reflect on

their experiences in ministry under the guidance of a CPE supervisor in a group with others who are being formed for the diaconate.

In order to provide a meaningful formation experience that allows integration of one's history, a variety of ministry skills, and a body of theology and theory, a unit of CPE will incorporate several aspects central to the life of a Deacon. Along with CPE, the curriculum focuses on areas of specialized ministries, theological reflection, the role and identity of a Deacon, liturgics, homiletics, ethics, and pastoral care. The clinical placement can be some combination of a parish context and a diaconal ministry discerned by the Postulant.

The group process is conducted through online video meetings. The group will meet via computer 30 to 35 times over the 10 months of formation. The group will have four to five face-to-face meetings, including orientation, and one or two days for integration of didactics. Individual supervision will be offered via telephone and, if desired, face-to-face. The mid-unit evaluation and final evaluation are factored into the discernment for candidacy by the COM-D and the Standing Committee.

2. Candidacy

During the Formation year the Postulant meets with the COM-D and Standing Committee and, based on recommendations, the Bishop Suffragan confers Candidacy in May or June of that year. (Candidacy is required for a minimum of 6 months before ordination.) Before meeting with COM-D, Postulant must meet with Sponsoring Presbyter and Vestry. At least 2/3 of Vestry and the Sponsoring Presbyter must certify in writing their approval for candidacy.

3. Ordination

At the end of the Formation Program the Candidate has a final meeting with Sponsoring Presbyter and Vestry. A letter of support for ordination must be signed and dated by at least 2/3 of the Vestry and the Presbyter. The candidate then meets with the COM-D and Standing Committee. The Standing Committee recommends candidate for ordination; if Bishop Diocesan and Suffragan concur, ordination is in January.

4. Formation following ordination

According to Canon III, 7 (Of the Life and Work of Deacons), section 4, sub-section (f), for "two years following ordination, new Deacons shall continue a process of formation authorized by the Bishop. Sub-section (g), The Bishop or the Bishop's designee, in consultation with the Commission [COM-D], shall assign each newly ordained Deacon a mentor Deacon where a suitable mentor Deacon is available. The mentor and Deacon shall meet regularly for at least one year to provide guidance, information, and a sustained dialogue about diaconal ministry."

Based on these requirements, the COM-D will refer the candidate approved for ordination to the Archdeacon who will, in consultation with the Bishop, (a) recommend a mentor Deacon and (b) agree upon a 2-year plan for continued formation of the newly ordained deacon (see below). The Archdeacon may confer with the members of the Chartered Committee for the Diaconate for both of these activities.

Continuing formation/education activities include:

- The annual deacons' retreat
- Clergy conference (in October) and clergy quiet day (during Lent)
- Spiritual direction
- Other diocesan events: regularly scheduled clericus meetings in each convocation, annual diocesan convention
- Outside the diocese: participation in Association of Episcopal Deacons, continuing education courses at local divinity schools.