

The Episcopal Diocese of Montana

Ministries Manual



November 2, 2016

This manual was compiled in accordance with the *2003 Title III Canon on Ministry* of the Protestant Episcopal Church in the United States of America and The Right Reverend C. Franklin Brookhart assisted by the Commission on Ministry of the Diocese of Montana.

The Commission on Ministry in the Episcopal Diocese of Montana offers this manual to those seeking to develop their baptismal call to ministry. It provides for the discernment of the ministry of all the baptized who are actively seeking a role in Christ's service. The discernment process inquires about the skills, abilities, and spiritual understanding of the person within the context of this call to ministry.

The directives for licensed and ordained ministries in the Diocese of Montana are provided for those seeking to serve in the Vineyard as licensed lay ministers, deacons, or priests. The necessary documents needed to complete the ordination process are available on the diocesan website: www.diomontana.com or from the Chair of the Commission on Ministry.

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Updates:

1. 2 June 2021 with new Transitional Deacon Experience, pages 38 and 39/rls
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Title III and Diocese of Montana
Ordination Ministries Manual
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Introduction

Where is God calling me? Where might I best serve God?

The process of discerning ministry in the Diocese of Montana is designed to help a person best answer the Spirit's call for the sake of the common good. In this process, more attention is paid to what benefits the Body of Christ than to the aspirations of the individual. Discernment is often less about personal fulfillment and more about the Church selecting its leaders. Discernment involves both listening to a private call and evaluating and defining the leadership needs of God's people. All ministry takes place in a community context, through relationships with others with whom we share God's life. Therefore, discerning and defining a call to ministry must always involve the community of faith assaying an individual's sense of call.

The Prayer Book defines priestly ministry as the proclamation of the Good News of Jesus Christ, the celebration of God's blessings and the reconciliation of sinners with God and each other. This kind of ministry is not restricted to the ordained alone. In fact, the Baptismal Covenant places the responsibility to perform such ministry on the shoulders of all the baptized because:

All baptized persons are called to ministry in the church and in the world. Specific orders of ministry exist to provide distinctive focus, vision, and leadership for all people in their various ministries; none is "better" or "superior / inferior".

There are elements of Episcopal, Presbyterian, and diaconal charism for ministry present in everyone. Some are especially called to embody one of them to help lead and invigorate the full ministry of all.

Lay Ministers are called, trained, and formed, to a distinctive ministry that brings Christ into the work place, the home, the community, and the church. The mission of the laity, as Christ bearers, is to carry on Christ's work of reconciliation in the world, and to create and sustain the worshipping community. The task of the laity is to accomplish that work in the world and in the church which serves God's purposes of justice, peace, human dignity, and the integrity of all creation.

Lay Professionals work for a stipend in the church, and are commonly (but not limited to) educators, youth leaders, administrators, secretaries, organists, and music directors.

Members of Religious Orders and Communities are called and formed to live under vows and the discipline of a distinctive community. Each order exercises a particular charisma and mission, as well as their own process for helping individuals discern a call. Some live in a traditional monastic community while others live as seculars in the world. A list of Religious Orders and Communities can be found in the Episcopal Church Annual, or at www.episcopalchurch.org.

Bishops are called, trained, formed, and ordained to a distinctive ministry on behalf of the larger church. The mission of the bishop, as shepherd of diocese, is to guard the faith, unity, and discipline of the whole church. Bishops act in Christ's name for the reconciliation of the whole Church, proclaim the Word of God, ordain others to continue Christ's ministry, and build up the whole of God's Kingdom by showing love and openness towards other denominations and faiths. They are the pastors of the clergy and administrators of the business of the diocese in their charge.

Deacons are called, trained, formed, and ordained to a distinctive ministry in the church and the world. The mission of the deacon, as herald of the kingdom of God, is to lead in reaching out to the poor, the sick, the suffering, and the helpless. Deacons bring the world's needs into the Church and the Servant

Church into the world; and they assist the bishop and priests in public worship and the administration of God's Word and Sacrament.

Priests are called, trained, formed, and ordained to a distinctive ministry on behalf of the community of faith. The mission of the priest, as pastor to the people of God, is a call to service, of sharing the Gospel and celebrating communal worship, to living in the Spirit as Christ bearer, and showing love and openness to the whole body of Christ's people. A priest is a leader who embodies initiative and vision; is able to motivate others and to energize churches into dynamic and growing congregations; has the ability to deal positively with the institution, as well as with interpersonal conflicts.

Episcopal Diocese of Montana

Guidelines for Parish Discernment of Call to Ministry

All baptized persons are called to minister in Christ's name, to identify their gifts with the help of the Church and to serve Christ's mission at all times and in all places.

Title III, Canon I, section 1(a)

The Church refers to our various ministries as “vocations,” both lay and ordained, because the Latin term *vocare* means literally, “to call.” Since the local parish is most often the spiritual and pastoral home of individuals called by God to lay or ordained ministry, the congregation plays a vital role in the exploration, discovery, and discernment of how we are called to use our gifts to the glory of God, for our own deepening faith in Christ, and in the service of others. While we hear God individually, God's voice is clearer in community. Given this, a congregation will form a local discernment committee to assist a person in exploring God's call for his or her life.

The role of the congregational discernment committee is to be proactive in the recruiting of individuals for ministry--both lay and ordained. We consider this a major theological, philosophical, and practical shift from the former “method of self selection”. Our new canons, adopted at General Convention 2003, guide our vision and encourage us to move to a communal approach to ministry discernment and development.

This committee shall be a group:

- Consisting of four or five persons selected by the Member of the Clergy or other leader exercising oversight and the vestry/bishop's committee.
- Consisting of one member who has previously sat on another such committee (when available).
- Representative of a cross section of the local congregation.
- That does not include the Member of the Clergy or other leader exercising oversight as a part of the meetings.
- That does not have anyone in Holy Orders on the committee.
- Trained by Commission on Ministry (COM) designated person(s), normally two COM members will train groups regionally.
- That meets for two or three hours a minimum of nine times over at least a six months period.
- That journeys with only one person in discernment at a time.
- Grounded in prayer and committed to pray for one another on a regular, ongoing basis.
- Faithful and consistent in their attendance.

- That works in complete confidentiality.
- Willing to ask difficult and challenging questions of the person in discernment and of each other.
- That probes the answers and doesn't assume that the initial answer is the final answer.
- More interested in good questions than clear answers.
- Familiar with the Baptismal Covenant in the *Book of Common Prayer*, p. 304-5.
- Committed to mutual listening, or open to listening to all members of the group.

Discernment Group Promise of Confidentiality

Parish or Mission Discernment Committee:

Signing below is a reminder to maintain confidentiality regarding all that occurs within the context of your call to discern a vocation. By having the promise in writing, the committee makes confidentiality an explicit expectation rather than implicit, and it serves as a reminder and a safeguard.

Confidentiality is important in establishing a trusting relationship. It is understood that things shared in the Parish or Mission Discernment process are held in confidence and will not be shared outside the group. By my signature, I agree to this statement.

(signature of participant)

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(signature of participant)

Parish or Mission Discernment Group Procedures

1. The Training

Once a committee has been selected, the person in discernment contacts the Chair of the Commission on Ministry to schedule a training session. It is essential that all members of the committee are present for the training. If a member is difficult to pin down for a meeting time, this should signal a person's inability to make a commitment to the group and a replacement member should be chosen.

If the person in discernment is not initially seeking ordination but wants discernment for what lay ministry they might do to serve their community, the discernment group may be formed and trained without going through the Bishop. However, if during the process ordination is discerned, the process needs to be suspended until the person in discernment can meet with the Bishop.

At the training session, the COM designated trainer(s) will:

- Remind the group that a commitment has been made to the discernment process and their regular attendance is expected.
- Distribute copies of these guidelines and the report form for individual use and note keeping during the meetings.
- Distribute copies of Susanne Farnham's *Listening Hearts* (Morehouse) for the committee and person in discernment to read and use throughout the process.
- Encourage particular attention to Chapter 4, pp. 29-37.
- Make sure everyone on the committee understands their task: that is an open, honest, and candid exploration in the context of a praying, believing, and caring community; it is not an "inquisition".
- Emphasize that it involves listening to the Spirit, thus times of silence are indispensable.
- Discuss the matter of absolute confidentiality and ask each member sign the *Confidentiality Statement* (see page 15).
- Familiarize the committee with the Ordination Rites and the Outline of Faith on Ministry found in the *Book of Common Prayer* (pp.510-555 and pp. 855-6 respectively), in case questions arise regarding the ordained ministry.

At the training, the committee selects a convener who will:

- Oversee the meetings and the schedule.

- Liaison with the COM designated trainer.
- Occasionally remind the committee of the importance of confidentiality. Note: If an outstanding problem should arise, particularly one involving “safe church” issues, the convener should talk with the Bishop immediately.
- At the end of each meeting, excuse the person in discernment and ask the committee to summarize what was heard.
- Prepare and submit a final report to the Member of the Clergy or other leader exercising oversight and to the Bishop.
- Shred all notes and other written materials concerning the discernment process excepting the final report.
- Assign a COM liaison who will serve as a proactive guide to the committee. The liaison and convener will check-in regularly; the liaison will conduct a follow-up training with the committee after they have met once or twice; the liaison will assure that the procedures and expectations for discernment groups are followed.

2. Establishing the Committee

Once trained, the committee should meet without the presence of the person in discernment in order to get acquainted with one another and the process. The members of the group need to be able to talk openly with one another, particularly about their own faith journey. After opening with prayer, the committee members ask one another the following questions:

- Does anyone have strong feelings that might hamper the process of discernment? These might be feelings around ordination, personality conflict, the person in discernment, and other personal issues. Putting these strong feelings on the table up front will help to diffuse or manage them.
- Who is Jesus for you?
- What happens when you pray?
- What is it that God appears to be doing in your life?
- What other matters need to be shared to establish a solid working relationship?
- Close with prayer.

3. The Discernment Process

Each meeting should open and close in prayer, followed by a reading of the Baptismal Covenant (BCP, pp. 304-5).

At the first and final meetings, the Baptismal Covenant should be read completely and explored. At the intervening meetings, one section from the Covenant should be considered, for example at the second meeting read and discuss belief in God the Father; at the third meeting, belief in the life, ministry, and resurrection of Jesus, and so forth.

At the first meeting, ask the person in discernment to state the reason the committee has been formed, and re-visit this question from time to time at ensuing meetings asking “where are you now with that?” and “are you getting any clarity?”

See *Listening Hearts*, Chapters 8 and 9 on support and accountability.

In addition, the committee should occasionally share what they think they are called to do, and whether or not they are getting any clarity.

The person in discernment should be given the opportunity at the beginning of each meeting to share what has come up since the previous meeting and how he or she has interacted with the previous discussion.

The committee should meet from time to time without the presence of the person in discernment in order to clarify the committee’s process. Meeting without the nominee is a necessary part of the process. This should be made clear to the nominee at the first meeting.

If a meeting should stall, explore the silence (see *Listening Hearts*, p. 61). Also review Appendix 1, “Guidelines for Discernment Groups”, p. 77f. for meeting ideas.

Over the period of meetings, the list of questions at the end of these guidelines should be explored. The questions asked should be:

caring	probing	concise	imaginative
intuitive	evocative	scriptural	reflective

Pause between responses and a new question in order to honor and heed what is being said.

Ways to build community and open ideas for exploration at a meeting include:

- Have a conversation addressing the following questions:
 - Who are you?
 - What is your life like?
 - What energizes you?

- Use the following four questions from the Quakers:
 - What was winter like when you were a child?
 - How was your house warmed?
 - When was God first a warm reality in your life?
 - How is God now warming your life?

- Refer to *Listening Hearts*, especially Appendix 2, pp. 89-95.

4. The Report

An in-depth report that makes a recommendation for baptismal ministry is to be prepared for submission. It needs to be forthright with affirmations, concerns and areas for growth.

It is recommended that the committee make use of the process of consensus when writing the report. Consensus seeks a general agreement among the committee through prayer, discussion, and listening, not through voting. A consensus does not mean that complete agreement has been met, but that nothing said in the report is objectionable to a given member. In other words, a member may disagree but can live with what is written.

The discernment reached may recommend a person pursue a particular ministry, lay or ordained; or it may state that the committee could not reach a discernment—it may be a “we don’t know” response which recommends the person wait and re-enter another discernment process sometime in the future.

Using the “questions to ponder” provided by the Commission on Ministry as a guide, the committee prepares a summary report for the Member of the Clergy or Priest-in-Charge and for the Bishop. The committee is urged to be candid in their report since the person in discernment, the Member of the Clergy, and the Bishop will rely on its contents for their evaluation and guidance of the person’s call to ministry.

If ordained ministry is discerned, the person will be considered a Nominee for Holy Orders, and the report will also be shared with the Vestry and Commission on Ministry.

5. The Final Meeting

The spouse, if applicable, should be invited to the final meeting to share in and respond to the discernment of the committee.

The written report is to be shared with the person (and spouse) and talked about openly within the group. Be intentional and allow plenty of opportunity for open discussion and for clarification of possible misconceptions.

During this meeting, it is advised that the group revisit the question asked at the second meeting when the committee was established: Does anyone have strong feelings that might hamper the process of discernment? Only this time, ask if these feelings have changed; and if so, how.

Find a way to bring closure to the group. This might include:

- Sharing how each member was impacted by the process.
- Re-visiting all of the questions asked at the initial “establishing the committee” meeting.
- Considering if there is anything the group, or individuals in the group, feel called to do in response to the discernment process.
- Exploring if an ongoing support group for the person in discernment is desired.

- Concluding with a liturgical rite within the context of a Sunday Eucharist, particularly appropriate is “A Form of Commitment to Christian Service” found in the *Book of Common Prayer* on page 420.

Finally, close with prayers of thanksgiving and dedication.

Bibliography:

Discerning Your Spiritual Gifts by Lloyd Edwards.

Discovering God’s Vision for your Life by the Stephen’s Ministries.

Gifts Differing by Isabel Briggs Myers.

Gifts Discernment Programs contact Jean and Bernard Haldane, Bay Vista Tower, 2821 2nd Ave., #1002, Seattle, WA 98121.

Living on the Border of the Holy: Renewing the Priesthood of all by L. William Countryman.

Many Servants: An Introduction to Deacons by Ormonde Plater. New Revised Ed.

Ministry in Daily Life: A Guide to the Baptismal Covenant, Episcopal Church Center, 1996.

Personality Type and Religious Leadership by Roy Oswald and Otto Kroeger.

Please Understand Me by David Kiersey and Marilyn Bates.

Prayer and Temperament: Different Prayer Forms for Different Personality Types by Chester Michael and Marie Norrisey.

The Scandal of Service by Jean Vanier.

Type Talk: the 16 personality types that determine how we live, love, and work by Otto Kroeger and Janet Thuesen.

Who We Are Is How We Pray by Charles J. Keating.

Discernment Committee Report Guide

*Questions marked with an * must be addressed in the report.*

See also Listening Hearts Appendix 2, pp. 89-95.

What is it that God appears to be doing in this person's life?

In what way does the community affirm what God is already doing in this person's life?

What it is that God appears to be doing in your community of faith?

*What skills does this person propose to offer to God for the purpose of service and the building up the body of Christ?

*In what ways is this person willing to make personal sacrifice in order to serve God and others?

*Does this person tend to monologue or dialogue with God? How about with others?

*What is this person's sense of self? Does this person seem: confident? doubting? aware? needy? dependent? on God? on others? Does the inner life connect or harmonize with the outer life?

What things facilitate his/her relationship with God?

What things interfere with his/her relationship with God?

Has this person recently had a conversion experience? If so, how is this person sorting his/her religious experience from a call to ministry?

What energizes or motivates this person?

*How does this person envision living out the Baptismal Covenant differently as lay person or as an ordained person? What is his/her understanding of baptismal ministry?

A few resources regarding ministry of the baptized may be found on line. They include:

1. A web site about Ministry in Daily Life sponsored by ECUSA and the ELCA. See www.episcopalchurch.org/ministry and click on link in right-hand column on link to "Ministry in Daily Life web site".
2. Coalition for Ministry in Daily Life. See www.dailylifeministry.org

*How does this person exercise servant ministry now? How would it be different if ordained?

*How does this person understand the ordained ministry? What seems be drawing this person toward ordained ministry?

Is this the person that the faith community has identified for ordained ministry?
(Not, does this community affirm what this person claims God is saying to him/her.)

How does this person regard the ordained ministry? As a profession among others? A way to earn a living? A privilege to be earned? A duty to be fulfilled? A grace to be accepted? A way to love God? A channel for serving others? A route to self-fulfillment?

*Why is this person in a discernment process?

Is this person's sense of call: clear and emphatic? subtle and obscure? open and evolving?

How does this person's daily life impact their sense of call? (see *Listening Hearts*, p. 9)

Call encompasses what we do and who we are. Is this person seeking a balance of doing and being, of action and prayer, as s/he seeks God's call? (see *Listening Hearts*, p. 11)

*If applicable, how does this person describe their marriage or other significant relationship? How does the spouse/significant other appear to perceive his/her call?

*What is this person's history of family, education, work, church experience, and what do they suggest about possible ministries?

*Is there anything in this person's past or present that may be an impediment to his/her ministry?

How has this person grappled with issues around their family of origin?

Is this person able to articulate their spiritual journey? Summarize their spiritual autobiography.

Does this person make diligent attempts towards reconciliation in broken relationships or serious differences in their past? Is s/he able to release the situation when attempts at reconciliation fail?

*How does this person respond when hard questions are asked or uncomfortable challenges are posed?

How does this person respond to obedience? waiting? reciprocity?

What happens when this person prays?

Who is Jesus for this person?

*In what ways does this person channel God's love? How have you experienced God's love through this person?

How does this person distinguish and/or meld God's voice from other persistent voices such as culture, peer pressure, career, ego, self-interest? (see *Listening Hearts*, p. 24)

*Describe this person's listening skills. Does s/he listen carefully, not at all, selectively?

*How does this person answer: What is the next step God wants me to take? (see *Listening Hearts*, p. 26)

*Does this person have the resources in time and funds to pursue the Diaconate or Priesthood?

*Is this person able to recognize and live with appropriate boundaries in areas such as leadership, finances, sexuality, and sense of responsibility?

What about Lay ministry opportunities in the church such as:

Parish Care or Pastoral Leader

Intercessor/Contemplative

Eucharistic ministry:

Preacher Worship Leader/Catechist

Healer Eucharistic Minister/Visitor

Arts ministry:

Musician Artist

Drama/Dancer Writer/Poet

Children/Youth (0-20 years) ministry

Senior (80+ years) ministry

The religious life, monastic/first order, secular or third order/oblate, or as an Associate

Outreach

What about Lay ministry opportunities in the world such as:

Missionary service

Teaching in a church school or college

Working in or running a shelter

Running for a political office

Doing *pro bono* work (legal, tax, financial, art, maintenance, etc.)

Raising a foster child

Urban ministry

Rural ministry

Ethnic ministry, especially American Indian ministry

What about Ordained Ministry:

Deacon

Priest

In what ways does this person bridge the faith community to the world?

In what ways does this person gather and/or nurture the community of faith?

What amount of time does this person have for a new ministry?

How does this person live out his or her discipleship in the world?

* What gifts have you seen in this person?

What about the poor, the hungry, the sick, the oppressed?

*Where do you see this person's growing edge? What weaknesses have you seen in this person?

*Does this person tend to work better alone or in groups? How is this person perceived when working with others?

On Licensed Ministries

Issued by the Bishop of the Diocese of Montana in Consultation with the Commission on Ministry

The following guidelines are based on **Title III Canon 4: Of Licensed Ministries** enacted by the General Convention 2003 of The Episcopal Church which states, in part:

Section 1:

(a) A confirmed communicant in good standing or, in extraordinary circumstances, subject to guidelines established by the Bishop, a communicant in good standing, may be licensed by the Ecclesiastical Authority to serve as Pastoral Leader, Worship Leader, Preacher, Eucharistic Minister, Eucharistic Visitor or Catechist. Requirements and guidelines for the selection, training, continuing education, and deployment of such persons and the duration of licenses shall be established by the Bishop in consultation with the Commission on Ministry.

Section 2:

(a) The Member of the Clergy or other leader exercising oversight of the congregation or other community of faith may request the Ecclesiastical Authority with jurisdiction to license persons within that congregation or other community of faith to exercise such ministries. The license may be revoked by the Ecclesiastical Authority upon request of or upon notice to the Member of the Clergy or other leader exercising oversight of the congregation or other community of faith.

(b) In renewing the license, the Ecclesiastical Authority shall consider the performance of the ministry by the person licensed, continuing education in the licensed area, and the endorsement of the Member of the Clergy or other leader exercising oversight of the congregation or other community of faith in which the person is serving.

(c) A person licensed in any Diocese under the provisions of this Canon may serve in another congregation or other community of faith in the same or another Diocese only at the invitation of the Member of the Clergy or other leader exercising oversight, and with the consent of the Ecclesiastical Authority in whose jurisdiction the service will occur.

The following identifies the training processes toward diocesan credentials for each licensed ministry as defined by **Canon 4** (*italicized*).

Section 3: *A Pastoral Leader is a lay person authorized to exercise pastoral or administrative responsibility in a congregation under special circumstances, as defined by the Bishop.*

- Licenses for the role of Pastoral Leader are not issued in the Diocese of Montana.

Section 4: *A Worship Leader is a lay person who regularly leads public worship under the direction of the Member of the Clergy or other leader exercising oversight of the congregation or other community of faith.*

Licenses issued by the Bishop are required for persons scheduled and serving in a congregation on a regular basis as a Worship Leader. The requirements and guidelines include:

- Be recommended by the congregation.

- Be recommended by the Member of Clergy or leader exercising oversight.
- Attend a diocesan or regional training session that focuses on styles and methods of worship leadership, and provides an evaluation at the conclusion of the training.
- If such training is not available, attend 4 training sessions under the guidance of a clergy person designated by the Bishop, or until all aspects of the ministry have been covered and are understood. An evaluation is required at the conclusion of the four sessions.
- Lead four worship services in the local congregation and receive feedback.

Section 5: *A Preacher is a lay person authorized to preach. Persons so authorized shall only preach in congregations under the direction of the Member of the Clergy or other leader exercising oversight of the congregation or other community of faith.*

Licenses issued by the Bishop are required for persons scheduled and serving in a congregation on a regular basis as a Preacher. The requirements and guidelines include:

- Be recommended by the congregation.
- Be recommended by the Member of Clergy or leader exercising oversight.
- Through oral examination and through written sermons, demonstrate an understanding of Scripture from an historical and metaphorical approach - should be included in training evaluation.
- Attend a diocesan or regional training session that focuses on preaching skills, and provides an evaluation at the conclusion of the training.
- If such training is not available, write and deliver 6 sermons under the guidance of a clergy person designated by the Bishop. An evaluation is required at the conclusion of the six preaching sessions.
- Preach three times to the local congregation and receive feedback from the local clergy and an appointed group (by the local clergy) consisting of members of the congregation.

Section: 6. *A Eucharistic Minister is a lay person authorized to administer the Consecrated Elements at a Celebration of Holy Eucharist. A Eucharistic Minister acts under the direction of a Deacon, if any, or otherwise, the Member of the Clergy or other leader exercising oversight of the congregation or other community of faith.*

Licenses issued by the Bishop are required for persons scheduled and serving in a congregation on a regular basis as a Eucharistic Minister. The requirements and guidelines include:

- Be supported by the congregation.
- Be recommended by the Member of Clergy or leader exercising oversight.
- Attend a diocesan or regional training session to learn and practice the order of Eucharist used in this ministry. Receive an evaluation at the conclusion of the training.
- If such training is not available, learn and practice the order of this ministry under the guidance of a clergy person designated by the Bishop at least four times, or until all aspects of the ministry have been covered and are understood.
- An evaluation is required at the conclusion of the training sessions.
- Exercise ministry in the local congregation at least three times and receive feedback.

Note: no more than eight persons will be licensed to serve as a Eucharistic Minister in any given church in the diocese at the same time.

Section 7: *A Eucharistic Visitor is a lay person authorized to take the Consecrated Elements in a timely manner following a Celebration of Holy Eucharist to members of the congregation who, by reason of illness or infirmity, were unable to be present at the Celebration. A Eucharistic Visitor should normally act under the direction of a Deacon, if any, or otherwise, the Member of the Clergy or other leader exercising oversight of the congregation or other community of faith.*

Licenses issued by the Bishop will be required for persons scheduled and serving in a congregation on a regular basis as a Eucharistic Visitor. The requirements and guidelines include:

- Be supported by the congregation.
- Be recommended by the Member of Clergy or leader exercising oversight.
- Attend a diocesan or regional training session to learn and practice the order of delivering the Eucharist to the infirm. Receive an evaluation at the conclusion of the training.
- If such training is not available, learn and practice the order of this ministry under the guidance of a clergy person designated by the Bishop at least four times, or until all aspects of the ministry are well understood.
- An evaluation is required at the conclusion of the training sessions.
- Exercise ministry on behalf of the local congregation under the supervision of the local clergy person or designated Eucharistic Visitor at least three times and receive feedback.

Note: No more than four persons will be licensed to serve as a Eucharistic Visitor in any given church in the diocese with a deacon at the same time, and not more than six persons in any church without a deacon at the same time.

Section 8: *A Catechist is a lay person authorized to prepare persons for Baptism, Confirmation, Reception, and the Reaffirmation of Baptismal Vows, and shall function under the direction of the Member of the Clergy or other leader exercising oversight of the congregation or other community of faith.*

Licenses issued by the Bishop will be required for persons serving in a congregation on a regular basis as a Catechist. The requirements and guidelines include:

- Be recommended by the congregation.
- Be recommended by the Member of Clergy or leader exercising oversight.
- Attend a diocesan or regional training session to learn catechetical methods and styles.
- Receive an evaluation at the conclusion of the training.
- If such training is not available, learn the order of this ministry and practice teaching under the guidance of a clergy person designated by the Bishop at least four times, or until all aspects of the course have been covered.
- An evaluation is required at the conclusion of the training sessions.
- Write up a sample class, with particular attention to the content to be shared and submit to the clergy person designated by the Bishop for evaluation.
- Exercise ministry in the local congregation at least three times and receive feedback.

The duration of licenses will be for two years unless otherwise specified at the time of licensing.

Normally, licenses will be issued from visitation to visitation by the Bishop.

On the Renewal of Licenses

The renewal of any licenses will include:

- Meeting with one's Rector or Missioner at the time of renewal to reflect upon the ministry, evaluate performance, personal growth, and to set personal goals for annual
- Continuing Education. In the case of ministries that involve a number of people exercising the same ministry, such as Eucharistic Ministers, a group meeting is sufficient.
- Be reaffirmed by the congregation.
- Be reaffirmed by the Member of Clergy or leader exercising oversight.
- Attend a diocesan or regional training session once every four years as a refresher course.
- Receive an evaluation at the conclusion of the re-training.
- Submit an evaluation and request for renewal to the Bishop.

Each person licensed, commissioned, or ordained will meet with one's Rector or Missioner at least once every two years to reflect upon recent progress and to set personal goals for annual Continuing Education. This is now a canonical requirement for all throughout the Episcopal Church.

The Tasks of a COM Mentor

A mentor may be assigned by the Bishop or when requested by the person in the process in order to promote the success of the person's process, and to foster clarity of communication and procedures.

Therefore, the mentor:

Promotes open and effective communication.

Verifies that the person has good support—local (parish), clerical, spiritual director, etc., and maintains, as liaison, an open dialogue with the sponsoring clergy.

Keeps in touch, if only to offer a friendly, “how are you doing?”

Understands the ordination process and guides the postulant/candidate along the way so that there are no surprises.

Makes a time commitment to the person in order to stay in regular communication.

Prays for the person(s) in their care.

Evaluates progress or problems in the process, especially by:

- Communicating with the person about the process when requested by the Bishop or other administrator, especially in regards to expectations and requirements that need to be fulfilled;
- Reporting and collaborating with the COM and Bishop on how the person is doing and/or needs that come up.

Steps to Ordination to the Vocational Diaconate in the Diocese of Montana

Note: The following steps to ordination are based on the Title III Canons enacted by the General Convention 2003 of The Episcopal Church. Canon 5 provides general provisions for all ordinations and Canons 6 provides the provisions for ordination to the Vocational Diaconate. The applicable Canons are noted within the text. Some requirements are particular to the diocese of Montana and are noted as such with the letters “MT”.

I. Nominee: The Initial Steps

1. The Nominee must be a confirmed, adult communicant in good standing from a local faith community with documentation of Baptism, Confirmation and Marriage, if applicable [MT and Title III Canon 6, Section 1(a)].
2. The Nominee must be resident and active in a local faith community for one year before the discernment process begins [MT and see Title III Canon 6 1(a)(2)].
3. Interview with the Bishop [Title III Canon 6, Section 1]:
 - Member of the Clergy or leader exercising oversight shall make the appointment with the Bishop for the Nominee.
 - Interview will include questions about: sense of call, views of God, rule of prayer, support of church and family, health, education, and life experience, faith journey, and finances sufficient to engage in theological education.
 - The Bishop may or may not direct the Nominee to continue to the next stage.
 - The Bishop will report back to the Clergy or leader exercising oversight after the interview has taken place.
4. Parish/local faith community discernment [Title III Canon 6, Section 1(a)]:
 - The Nominee will meet with a discernment committee at least nine times over a period of at least six months.
 - The Discernment Committee will be named by the Priest and Vestry and shall consist of at least four persons who are sympathetically neutral.
 - The Discernment Committee will be trained by a COM designated person.
 - The Discernment Committee is to help the Nominee clarify his/her vocation, and help in the formation process for Baptismal Ministry.
 - The Committee shall deal with issues of call, family, physical and mental health, spiritual gifts, education, ability to grow and change, ability to work with people, and the Nominee’s theology—see the *Guidelines for Parish Discernment of Call to Ministry*.
 - The Committee will, at the end of the process, write a detailed description of their findings and an evaluation based on the *Guidelines* report form. The report is to be shared with the Nominee; and copies of it shall be sent to the Bishop, the Commission on Ministry chair, and the local priest.

The Nominee shall supply the following documents:

5. The canonical letter of support from the Nominee’s congregation or other community of faith entitled *Endorsement of Application for Postulancy for Holy Orders*, including a statement of commitment from the faith community to involve itself in the Nominee’s preparation for ordination. If it be a congregation,

the letter shall be signed and dated by a two-third's majority of the Vestry, and the Member of the Clergy or leader exercising oversight [Title III Canon 5, Section 2(c) and Title III Canon 6, Section 1(a)(7)].

6. The canonical form entitled *Application for Postulancy for Holy Orders* which shall include [Title III Canon 6, Section 1(a)(1-3,8)]:

- Full name and date of birth
- Marital status
- Length of time resident in the Diocese of Montana
- Evidence of Baptism and Confirmation
- Whether an application or Nomination has been made previously for Postulancy for Holy Orders in any diocese
- Levels and type of education attained, and, if any, the degrees earned and areas of specialization, including official transcripts
- A written request from the Nominee for admission to Postulancy which includes a description of the process of discernment by which the Nominee has been identified for ordination to the Vocational Diaconate.

7. When all of these materials are on file with the diocese, the Nominee will be interviewed by the Commission on Ministry; and the COM will report to the Bishop about the interview [MT].

8. The Bishop may admit the Nominee to Postulancy.

- Notification of Nominee's status is sent to the Nominee, COM, and Member of the Clergy or leader exercising oversight [see Title III Canon 6, Section 1].
- Assumption: Postulancy is a time to postulate—or to lay one's call "on the table" for exploration. Therefore, the initial stages of Nomination and Postulancy are times of discernment and formation for Baptismal Ministry; there is implied no guarantee of ordination.

9. If Postulancy is granted, a mentor/liaison from the COM will be assigned [MT].

II. Postulancy: the Second Stage

1. The Postulancy stage lasts a minimum of six months [MT] and includes a process of exploration of and decision on the Postulant's call to the diaconate [Title III Canon 6, Section 1(b)].

During this period the following material needs to be filed with the diocese [see Title III Canon 6, Section 1(b)(iii)]:

2. A signed consent for release of confidential information to the Bishop on the form provided by the Church Pension Fund entitled "*Authorization to Release Information, Release of Claims and Indemnity to Hold Harmless Agreement*". Copies of this form are sent to the diocese and to the examining clinicians.

*3. A physical exam using the canonical form put out by the Church Pension Fund entitled, *Required Medical Examination* [Title III Canon 6, Section 1(b)(1)(ii)].

*4. A psychiatric and/or psychological exam from a person appointed by the bishop and using the canonical forms put out by the Church Pension Fund including [Title III Canon 6, Section 1(b)(1)(ii)]:

- The *Life History Questionnaire* (LHQ) is necessary for the exam and should be sent to the clinician with sufficient time for review before the face-to-face appointment.

- The *Behavioral Screening Questionnaire* (BSQ) is necessary for the exam. One copy should be sent to the clinician with sufficient time for review before the appointment, and a copy should be sent to the diocese.
- *The Required Mental Health Evaluation from Psychiatrist (M.D.) or Clinical Psychologist (PhD)*. If the postulant has a history of mental illness/disorder or uses psychotropic drugs, a psychiatric exam is required.

*5. A thorough Background check completed by a company designated by the diocese [Title III Canon 6, Section 1(b)(1)(i)].

*These must be completed within 36 months of ordination, or they must be updated [Title III Canon 6, Section 3 (h)].

6. A course of study and formation is determined by the Bishop and COM with the following considerations from Title III Canon 6, Section 3:

- It will be conducted in community where communal worship and exposure to a variety of viewpoints may be experienced [(e)].
- It shall take into account local culture, background, age, occupation, and ministry [(d)].
- Prior education and life experience may be considered [(d)].
- Areas for study and formation include [(b)]:
 - I. Academic
 - A. Holy Scriptures
 - B. Theology
 - C. Tradition of the Church
 - II. *Diakonia* and the Diaconate
 - III. Human awareness and understanding
 - IV. Spiritual Development and Discipline
 - V. Practical Training and Experience (Including Internship and CPE [MT])

7. Reaffirmation from local faith community using the canonical form entitled, *Endorsement of Application for Candidacy for Holy Orders*, including a statement of commitment from the faith community of continued involvement in the Postulant's formation. If it be a congregation, the letter shall be signed and dated by a two-third's majority of the Vestry, and the Member of the Clergy or leader exercising oversight [Title III Canon 5, Section 2(c), MT, and see Title III Canon 6, Section 2 (a)].

8. The canonical form entitled *Application for Candidacy for Holy Orders* which shall include the date of admission to Postulancy [MT].

9. During Postulancy,

- Ember letters are to be sent to the bishop on Ember Days, using the guidelines supplied by the Bishop [MT and see Canon 6, Section 3(f)].
- Regular letters of evaluation by persons authorized by the COM to be in charge of the evaluation program must be filed [Title III Canon 6, Section 3 (g)].
- Regular (at least quarterly) meetings with a Spiritual Director [MT].

10. When all the appropriate documents are on file with the diocese, the Postulant will be interviewed by the Bishop and the COM, who will make a recommendation to the Bishop [Title III Canon 6, Section 1 (b)(2)].

11. The Bishop may admit the Postulant to Candidacy. Written notification of status is sent to the Postulant, COM, and Member of the Clergy or leader exercising oversight [Title III Canon 6, Section 1(b)(3)].

III. Candidacy: the Third Stage

Candidacy is a time of formation in preparation for ordination to the Diaconate, established by a formal commitment by the Candidate, the Bishop, the COM, and the congregation or other community of faith [Title III Canon 6, Section 2(a)]. It assumes the likelihood of ordination.

1. The Candidacy stage lasts a minimum of one year in length [Title III Canon 6, Section 2(a)].
2. During Candidacy, the following certifications must be completed and filed with the diocese [Title III Canon 6, Section 3 (c)]:
 - Certificate of Sexual Misconduct Training
 - Certificate of Anti-Racism Training
 - Certificate of Title IV Training

In addition, during this period the following material needs to be filed with the diocese:

3. Quarterly Ember letters must be sent to the Bishop [Title III Canon 6, Section 3(f)].
4. Evaluations and Certificates of completion of educational and formation programs with a recommendation for ordination to the Diaconate [Title III Canon 6, Section 3 (b)&(g); see 5-7 below].
5. Participants in the Diocesan School for Deacons will be examined for competency in the three appointed canonical areas:
 - Holy Scriptures
 - Theology
 - The Tradition of the Church

The method of examination will be determined by the faculty member responsible for teaching the particular canonical area; such examination will take place upon completion of the study of each appointed canonical area.

As well as completion of a project [MT] that demonstrates understanding of:

- *Diakonia* and the Diaconate (practical, historical, and worldwide)
 - Human Awareness and Understanding [see Title III Canon 6, Section 3 (b)&(g)].
6. Certificate of completion of the Diaconal Formation Ministry Experience (DFME) to consist of a parish internship and a hands-on diaconal project will be required. [Title III Canon 6, Section 3(g)].
 7. Reaffirmation from local faith community using the canonical form entitled, *Endorsement for Ordination to the Sacred Order of Deacons*. If it be a congregation, the letter shall be signed and dated by a two-third's majority of the Vestry, and the Member of the Clergy or leader exercising oversight [Title III Canon 5, Section 2(c) and MT].
 8. Application requesting ordination using the canonical form entitled, *Application to be Ordained to the Sacred Order of Deacons* which shall include the dates of admission to Postulancy and Candidacy [Title III Canon 6, Section 3(i)].

9. When all the requirements are fulfilled and the appropriate documents are on file with the diocese, the candidate will be interviewed by:

- the Bishop, who will certify readiness to the Standing Committee;
- and the COM, who will make a recommendation to the Bishop and provide a statement to the Standing Committee [MT and Canon 6, Section 3(g)].

10. Standing Committee certifies that all the documentation is in order and that there are no objections to ordination as a Deacon [Title III Canon 5, Section 2(b) and Title III Canon 6, Section 3(j)].

11. Ordination to the Diaconate if the Candidate is at least 21 years old [Title III Canon 6, Section 3(i)]. The declaration required in Article VIII of the Constitution is signed [MT].

Note Bene:

The Bishop may at his or her discretion remove a person from the process at any point along the way. Written notification of the removal is sent to the person in formation, the COM, and Member of the Clergy or leader exercising oversight [Title III Canon 6, Section 2(c)].

If removed from the process in another diocese, a letter of explanation is required [MT and see Title III Canon 6, Section 1(a)(4)].

No one in the process may transfer from another diocese; that person must begin the process anew, including the one year residency [MT].

There are no transfers from the Vocational Diaconate to the Priesthood; the process must begin anew, but the Transitional Diaconate is waived [Title III Canon 8, Section 7(f)].

Steps to Ordination Checklist: Deacon Title III and Diocese of Montana

I. Nominee: steps to Postulancy

- 1. Nomination of a communicant in good standing from local faith community.
- 2. Nominee canonically resident in local faith community 1 year before discernment begins.
- 3. Interview with the Bishop.
- 4. Parish Discernment report.
- 5. *Endorsement of Application for Postulancy for Holy Orders* (Vestry and clergy support).
- 6. *Application for Postulancy for Holy Orders* (by Nominee).
- 7. Interview with COM.
- 8. Notification of status sent.
- 9. COM mentor assigned.

II. Postulant: steps to Candidacy

- 1. A minimum of six months since Postulancy granted.
- 2. Consent of *Release of Information* filed with diocese and examining clinicians.
- 3. Physical (within 36 months of ordination).
- 4. Psychiatric/Psychological (within 36 months of ordination).
- 5. Background check (within 36 months of ordination).
- 6. Course of study/formation determined and underway.
- 7. *Endorsement of Application for Candidacy for Holy Orders* (re-affirmation from local faith community).
- 8. *Application for Candidacy for Holy Orders* (by Postulant).
- 9. During Postulancy:
 - Ember letters sent to bishop.
 - Evaluation from educational program.
 - Regular (at least quarterly) meetings with a Spiritual Director.
- 10. Interviews with Bishop and with COM.
- 11. Notification of status sent.

III. Candidate: steps to Ordination as Deacon

- 1. A minimum of one year since Candidacy granted.
- 2. During Candidacy, the following certifications must be filed with the diocese:
 - Certificate in Sexual misconduct training
 - Certificate in Anti-racism training

- Certificate in Title IV training
- 3. Ember letters sent to Bishop.
- 4. Course of study/formation completed, with recommendation for ordination.
- 5. Ordination exams.
- 6. Certificate of completion of the Diaconal Formation Ministry Experience (DFME) to consist of a parish internship and a hands-on diaconal project.
- 7. *Endorsement for Ordination to the Sacred Order of Deacons* (re-affirmation from local faith community).
- 8. *Application to be Ordained to the Sacred Order of Deacons* (by Candidate).
- 9. Interviews with COM and Bishop.
 - Certification for Ordination from Bishop to Standing Committee
 - Endorsement for Ordination from COM to Standing Committee
- 10. Standing Committee certification that all in is order.
- 11. At least 24 years old and Declaration signed at ordination.

Steps to Ordination to the Priesthood in the Diocese of Montana

Note: The following steps to ordination are based on the Title III Canons enacted by the General Convention 2003 of The Episcopal Church. Canon 5 provides general provisions for all ordinations and Canon 8 provides the provisions for ordination to the Priesthood. The applicable Canons are noted within the text. Some requirements are particular to the diocese of Montana and are noted as such with the letters “MT”.

I. Nominee: The Initial Steps

1. The Nominee must be a confirmed, adult communicant in good standing from a local faith community with documentation of Baptism, Confirmation and Marriage, if applicable [MT and Title III Canon 8, Section 2(d)(2); see also Title III Canon 8, Section 3(b)(1)].
2. The Nominee must be resident and active in a local faith community for one year before the discernment process begins [MT and see Title III Canon 8, Section 3(a)(2)].
3. Interview with the Bishop [Title III Canon 8, Section 3(b)(1-3) and (c)]:
 - Member of the Clergy or leader exercising oversight shall make the appointment with the Bishop for the Nominee.
 - Interview will include questions about: sense of call, views of God, rule of prayer, support of church and family, health, education and life experience, faith journey, and finances sufficient to engage in theological education.
 - The Bishop may or may not direct the Nominee to continue to the next stage.
 - The Bishop will report back to the Clergy or leader exercising oversight after the interview has taken place.
4. Parish/local faith community discernment [Title III Canon 8, Section 3(a)(5)]:
 - The Nominee will meet with a Discernment Committee at least nine times over a period of at least six months.
 - The Discernment Committee will be named by the Priest and Vestry and shall consist of at least 4 persons who are sympathetically neutral.
 - The Discernment Committee will be trained by a COM designated person.
 - The Discernment Committee is to help the Nominee clarify his/her vocation, and to help in the formation process for Baptismal Ministry.
 - The Committee shall deal with issues of call, family, physical and mental health, spiritual gifts, education, ability to grow and change, ability to work with people, and the Nominee’s theology—see the *Guidelines for Parish Discernment of Call to Ministry*.
 - The Committee will, at the end of the process, write a detailed description of their findings and an evaluation based on the *Guidelines* report form. The report is to be shared with the Nominee; and copies of it shall be sent to the Bishop, the Commission on Ministry chair, and the local Priest.

The Nominee shall supply the following documents:

5. The canonical letter of support from the Nominee’s congregation or other community of faith entitled *Endorsement of Application for Postulancy for Holy Orders*, including a statement of commitment from the faith community to involve itself in the Nominee’s preparation for ordination. If it be a congregation, the letter shall be signed and dated by a two-third’s majority of the Vestry, and the Member of the Clergy

or leader exercising oversight [Title III Canon 5, Section 2(c), Title III Canon 8, Section 2(b)&(d)(2), and Title III Canon 8, Section 3(a)(7)].

6. The canonical form entitled *Application for Postulancy for Holy Orders* which shall include [Title III Canon 8, Section 3(a)(1-6,8)]:

- Full name and date of birth
- Marital status
- Length of time resident in the Diocese of Montana
- Evidence of Baptism and Confirmation
- Whether an application or Nomination has been made previously for Postulancy for Holy Orders in any diocese
- Levels and type of education attained, and, if any, the degrees earned and areas of specialization, including official transcripts
- A written request from the nominee for admission to Postulancy which includes a description of the process of discernment by which the Nominee has been identified for ordination to the Priesthood.

7. When all of these materials are on file with the diocese, the Nominee will be interviewed by the Commission on Ministry; and the COM will report to the Bishop about the interview [Title III Canon 8, Section 3(d)].

8. The Bishop may admit the Nominee to Postulancy.

- Written notification of Nominee's status is sent to the Nominee, COM, Member of the Clergy or leader exercising oversight, the Standing Committee, and the Dean of the applicable seminary or Director of the formation program [Title III Canon 8, Section 3(e)].
- Assumption: Postulancy is a time to postulate—or to lay one's call “on the table” for exploration. Therefore, the initial stages of Nomination and Postulancy are times of discernment and formation for Baptismal Ministry; there is implied no guarantee of ordination.

9. If Postulancy is granted, a mentor/liaison from the COM will be assigned [Title III Canon 8, Section 2(d)(3)].

II. Postulancy: the Second Stage

1. The Postulancy stage lasts a minimum of six months for exploration of and decision on the Postulant's call to Priesthood [Title III Canon 8, Section 2(a)].

During this period the following material needs to be filed with the diocese:

2. A signed consent for release of confidential information to the Bishop on the form provided by the Church Pension Fund entitled “*Authorization to Release Information, Release of Claims and Indemnity to Hold Harmless Agreement*”. Copies of this form are sent to the diocese and to the examining clinicians.

*3. A physical exam using the canonical form put out by the Church Pension Fund entitled, *Required Medical Examination* [Title III Canon 8, Section 2(e)(3)].

*4. A psychiatric and/or psychological exam from a person appointed by the bishop and using the canonical forms put out by the Church Pension Fund [Title III Canon 8, Section 2(e)(3)] including:

- The *Life History Questionnaire* (LHQ) is necessary for the exam and should be sent to the clinician with sufficient time for review before the face-to-face appointment.

- The *Behavioral Screening Questionnaire* (BSQ) is necessary for the exam. One copy should be sent to the clinician with sufficient time for review before the appointment, and a copy should be sent to the diocese.
- *The Required Mental Health Evaluation from Psychiatrist (M.D.) or Clinical Psychologist (PhD)*. If the postulant has a history of mental illness/disorder or uses psychotropic drugs, a psychiatric exam is required.

*5. A thorough Background check completed by a company designated by the diocese [Title III Canon 8, Section 2(e)(1)].

*These are to be completed within 36 months of ordination, or they must be updated [Title III Canon 8, Section 2 (e)(4) and Title III Canon 8, Section 7 (a)(3)].

6. A course of study and formation is determined by the Bishop and COM with the following considerations from Title III Canon 8, Section 4:

- It will be conducted in community where communal worship and exposure to a variety of viewpoints may be experienced [(c)].
- It shall take into account local culture, background, age, occupation, and ministry [(d)].
- Prior education and life experience may be considered [(a)&(b)].
- Seminary is the norm, and study at an ECUSA seminary is preferred [MT].
- Areas for study and formation include [(e)]:

I. Academic

- A. Holy Scriptures
- B. Church History, including the Ecumenical Movement
- C. Theology, including Missionary Theology and Missiology
- D. Christian Ethics and Moral Theology
- E. Studies in Contemporary Society, including racial and minority groups
- F. Liturgics and Church Music
- G. Theory and Practice of Ministry

II. Emotional Development

III. Spiritual Development and Discipline

IV. Practical Training and Experience (including Internship and CPE [MT])

7. Reaffirmation from local faith community using the canonical form entitled, *Endorsement of Application for Candidacy for Holy Orders*, including a statement of commitment from the faith community of continued involvement postulant's formation. If it be a congregation, the letter shall be signed and dated by a two-third's majority of the Vestry, and the Member of the Clergy or leader exercising oversight [Title III Canon 5, Section 2(c), Title III Canon 8, Title III Section 5(a)(2)].

8. The canonical form entitled *Application for Candidacy for Holy Orders* which shall include the date of admission to Postulancy [Title III Canon 8, Section 5(a)].

9. During Postulancy:

- Ember letters are to be sent to the Bishop on Ember Days, using the guidelines supplied by the Bishop [Title III Canon 8, Section 2(d)(1)].
- Regular, at least yearly, letters of evaluation from the educational program must be filed with the diocese [Title III Canon 8, Section 2(d)(5)].
- Attendance at the diocesan Postulant's retreat [MT].
- Regular (at least quarterly) meetings with a Spiritual Director [MT].

10. When all the appropriate documents are on file with the diocese, the Postulant will be interviewed by the Bishop [see Title III Canon 8, Section 5 (a)], and the COM, who will make a recommendation to the Bishop [see Title III Canon 8, Section 5 (b)].

11. The Bishop may admit the Postulant to Candidacy. Written notification of status is sent to the Postulant, COM, and Member of the Clergy or leader exercising oversight, the Standing Committee, and the Dean of the applicable seminary or Director of the formation program [Title III Canon 8, Section 5(b)].

III. Candidacy: the Third Stage

Candidacy is a time of formation in preparation for ordination to the Priesthood, established by a formal commitment by the Candidate, the Bishop, the COM, and the congregation or other community of faith [Title III Canon 8, Section 2(b)]. It assumes the likelihood of ordination.

1. The candidacy stage lasts a minimum of six months with an overall minimum of 18 months of combined Postulancy, Candidacy and Diaconate [Title III Canon 8, Section 2(b)&(c) and Title III Canon 8, Section 6(c)].

2. During candidacy, the following certifications must be completed and filed with the diocese Canon 8, Section 2 (e)(2):

- Certificate of Sexual Misconduct Training
- Certificate of Anti-Racism Training
- Certificate of Title IV Training

In addition, during this period the following material needs to be filed with the diocese:

3. Quarterly Ember letters must be sent to the Bishop [Title III Canon 8, Section 2 (d)(1)].

4. Evaluations and Certificate of completion of educational program with a recommendation for Ordination [Title III Canon 8, Section 6 (d)(3) and Title III Canon 8, Section 7 (b)(4)].

5. Ordination exams, showing competence in the following appointed seven canonical areas [MT, see Title III Canon 8, Section 4 (e) and Title III Canon 8, Section 6 (d)(3)]:

- Holy Scriptures
- Church History, including the Ecumenical Movement
- Theology, including Missionary Theology and Missiology
- Christian Ethics and Moral Theology
- Studies in Contemporary Society, including racial and minority groups
- Liturgics and Church Music
- Theory and Practice of Ministry

6. Internship in a church other than one's sponsoring faith community, concluding with a written assessment from trainers [MT and see Title III Canon 8, Section 4(e)(7)].

7. Certificate of completion of an approved Clinical Pastoral Education (CPE) program with an accompanying assessment [MT and see Title III Canon 8, Section 4 (e)(7)].

8. Reaffirmation from local faith community using the canonical form entitled, *Endorsement for Ordination to the Sacred Order of Deacons*. If it be a congregation, the letter shall be signed and dated by a two-third's majority of the Vestry, and the Member of the Clergy or leader exercising oversight [Title III Canon 5, Section 2(c) and Title III Canon 8, Section 6(d)(2)].
9. Application requesting ordination using the canonical form entitled, *Application to be Ordained to the Sacred Order of Deacons* which shall include the dates of admission to Postulancy and Candidacy [Title III Canon 8, Section 6 (d)(1)].
10. When all the requirements are fulfilled and the appropriate documents are on file with the diocese, the Candidate will be interviewed by
 - the Bishop, who will certify to the Standing Committee the person's readiness for ordination.
 - and the COM, who will make a recommendation to the Bishop and provide a statement to the Standing Committee [MT and Title III Canon 8, Section 6 (e)(3)].
11. Standing Committee certifies that all the documentation is in order and that there are no objections to ordination as a Deacon [Title III Canon 5, Section 2(b), Title III Canon 8, Section 2(d)(4), and Title III Canon 8, Section 6(e)(1-3), (f)].
12. Ordination to the Diaconate if the Candidate is at least 21 years old [Title III Canon 8, Section 6(b)]. The declaration required in Article VIII of the Constitution is signed [Title III Canon 8, Section 6 (g)].

IV. Transitional Diaconate: the Fourth Stage

1. The Diaconate must be at least six months in length [Title III Canon 8, Section 7(a)(1)].
 2. During this period, the Deacon must be involved in a significant Diaconal Ministry approved by the Archdeacon, a report of which is sent to the diocese. Collegiality with the Community of Deacons must be developed [MT] (see page 51 for description).
- The following documents must be filed with the diocese:
3. Quarterly Ember letters sent to the Bishop [Title III Canon 8, Section 2 (d)(1)].
 4. Reaffirmation of the local faith community using the canonical form entitled, *Endorsement for Ordination to the Priesthood*. If it be a congregation, the letter shall be signed and dated by a two-third's majority of the Vestry, and the Member of the Clergy or leader exercising oversight [Title III Canon 5, Section 2(c) and Title III Canon 8, Section 7(b)(2)].
 5. Application requesting ordination using the canonical form entitled, *Application to be Ordained to the Priesthood* which shall include the dates of admission to Postulancy, Candidacy, and Ordination as a Deacon [Title III Canon 8, Section 7(b)(1)].
 6. Certification of admission to Postulancy and Candidacy including dates of admission, and ordination to the Diaconate provided by the Bishop to the Standing Committee [Title III Canon 8, Section 7(b)(3)].
 7. The COM interviews the Deacon and attests to the successful completion of the formation program designed during Postulancy. The COM recommends to the Bishop and provides a statement to the Standing Committee that the Deacon is ready for ordination to the Priesthood [Title III Canon 8, Section 7 (b)(5)].

8. The Standing Committee certifies that all the documentation is in order and that there are no objections to ordination as a Priest [Title III Canon 5, Section 2(b), Title III Canon 8, Section 2(d)(4), and Title III Canon 8, Section 7(b & c)].

9. A cure obtained. See Title III Canon 8, Section 7(e) for a full description of what qualifies as a “cure”.

10. Ordination to the Priesthood, if the Deacon is at least 24 yrs old [Title III Canon 8, Section 7(a)(2)]. The declaration required in Article VIII of the Constitution is signed [Title III Canon 8, Section 7(d)].

11. The Bishop, in consultation with the COM, assigns the newly ordained Priest to a mentor Priest for at least one year. The mentor relationship shall consist of regular meetings for guidance, information and sustained dialogue about Priestly Ministry [Title III Canon 9, Section 2].

Note Bene:

The Bishop may at his/her discretion remove a person from the process at any point along the way. Written notification of the removal is sent to the Person in formation, the COM, and Member of the Clergy or leader exercising oversight, the Standing Committee, and the Dean of the applicable seminary or Director of the formation program [Title III Canon 8, Section 3(f) and Title III Canon 8, Section 5(e)].

If removed from the process in another diocese, a letter of explanation is required [Title III Canon 8, Section 3(g)].

No one in the process may transfer from another diocese; that person must begin the process anew, including the one year residency [MT; see Title III Canon 8, Section 5(c,d,f)].

There are no transfers from the Vocational Diaconate to the Priesthood. The process must begin anew, but the Transitional Diaconate is waived [Title III Canon 8, Section 7(f)].

Steps to Ordination Checklist: Priest Title III and Diocese of Montana

I. Nominee: Steps to Postulancy

- 1. Nomination of a communicant in good standing from local faith community.
- 2. Nominee canonically resident in local faith community 1 year before discernment begins.
- 3. Interview with the Bishop.
- 4. Parish Discernment report.
- 5. *Endorsement of Application for Postulancy for Holy Orders* (Vestry and clergy support).
- 6. *Application for Postulancy for Holy Orders* (by Nominee).
- 7. Interview with COM.
- 8. Notification of status sent.
- 9. COM mentor assigned.

II. Postulant: Steps to Candidacy

- 1. A minimum of six months since Postulancy granted.
- 2. Consent of *Release of Information* filed with diocese and examining clinicians.
- 3. Physical (within 36 months of ordination).
- 4. Psychiatric/Psychological (within 36 months of ordination).
- 5. Background check (within 36 months of ordination).
- 6. Course of study/formation determined and underway.
- 7. *Endorsement of Application for Candidacy for Holy Orders* (re-affirmation from local faith community).
- 8. *Application for Candidacy for Holy Orders* (by Postulant).
- 9. During Postulancy,
 - Ember letters sent to bishop.
 - Evaluation from educational program.
 - Attendance at diocesan Postulant's retreat.
 - Regular (at least quarterly) meetings with a Spiritual Director.
- 10. Interviews with Bishop and with COM.
- 11. Notification of status sent.

III. Candidate: Steps to Ordination as Deacon

- 1. A minimum of six months since Candidacy granted.
- 2. During Candidacy, the following certifications must be filed with the diocese:
 - Certificate in Sexual misconduct training
 - Certificate in Anti-racism training
 - Certificate in Title IV training
- 3. Ember letters sent to Bishop.
- 4. Course of study/formation completed, with recommendation for ordination.
- 5. Ordination exams
- 6. Internship outside of sponsoring parish with an accompanying assessment
- 7. Certificate of completion of CPE with an accompanying assessment
- 8. *Endorsement for Ordination to the Sacred Order of Deacons* (re-affirmation).
- 9. *Application to be Ordained to the Sacred Order of Deacons* (by Candidate).
- 10. Interviews with COM and Bishop.
 - Certification for Ordination from Bishop to Standing Committee
 - Endorsement for Ordination from COM to Standing Committee
- 11. Standing Committee certification that all in is order.
- 12. At least 21 years old and Declaration signed at ordination.

IV. Transitional Deacon: Steps to Ordination as Priest

- 1. A minimum of six months since ordained Deacon.
- 2. Diaconal Ministry and Collegiality project completed
- 3. Ember letters sent to Bishop.
- 4. *Endorsement for Ordination to the Priesthood* (re-affirmation).
- 5. *Application to be Ordained to the Priesthood* (by Deacon).
- 6. Evidence of Postulancy, Candidacy and ordination to the Diaconate.
- 7. Interview with COM and Bishop.
 - Certification for Ordination from Bishop to Standing Committee
 - Endorsement for Ordination from COM to Standing Committee
- 8. Standing Committee certification that all in is order.
- 9. Cure obtained.
- 10. Ordination to the Priesthood, if the Deacon is at least 24 yrs old.
- 11. One year mentor assignment established for first year as priest.

DIOCESE OF MONTANA
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THE TRANSITIONAL DEACON EXPERIENCE

Goals of the Program

Goals include demonstrated competencies in 5 general areas: 1) Diakonia and the diaconate; 2) human awareness and understanding; 3) spiritual development and discipline; 4) practical training and experience AND 5) evidence of a clear understanding of shared ministry. Achievement of competencies/goals will be addressed in monthly written journal entries to include cross referencing activities, noted in those entries, to the competencies listed below. The Transitional Deacon is strongly encouraged to incorporate theological reflections upon the activities into his/her journaling notes. The notes will be submitted (by mail or e-mail) by the end of each month followed by either an in-person or telephone conversation with the Archdeacon of the Diocese at a mutually agreed upon time.

The Book of Common Prayer and Canonical Expectations

“My brother/sister, every Christian is called to follow Jesus Christ, serving God the Father, through the power of the Holy Spirit. God now calls you to a special ministry of servanthood directly under your bishop. In the Name of Jesus Christ, you are to serve all people, particularly the poor, the weak, the sick and the lonely.

As a deacon in the church, you are to study the Holy Scriptures, to seek nourishment from them, and to model your life upon them. You are to make Christ and his redemptive love known by your word and example to those among whom you live and work and worship. You are to interpret to the church the needs, concerns and hopes of the world. You are to assist the bishop and priests in public worship and in the preaching of God’s word and the administration of the sacraments. You are to carry out other duties assigned to you from time to time. At all times, your life and teachings are to show Christ’s people that in serving the helpless they are serving Christ himself.”

BCP, Page 543

Towards Fulfilling Competency Expectations (Group A)

1. Demonstrate the ability to integrate knowledge and experience;
2. Develop/articulate/practice a “Rule of Life;”
3. Present examples to illustrate the impact of the deacon’s ministry on those whom s/he is in relationship with;

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4. Demonstrate skills in conflict management;
5. Exhibit skills required to empower individuals and groups;
6. Evidence skills for raising awareness about contemporary/local social issues;
7. Demonstrate an understanding of the deacon as interpreter and catalyst;

8. Display skills in community coalition building;
9. Demonstrate skills in working with volunteers;
10. Evidence skills in communicating the presence of Christ.

Additional Specifics Towards Fulfilling Competency Expectations (Group B)

1. Articulate the basic terms of the baptismal covenant;
2. Define the theological implications of a local area social issue;
3. Define your personal theology including personal preferences and biases;
4. Discern the local language and/or cultural speech and customs;
5. Research outreach ministries within the community, how to access their services, and what volunteer opportunities they provide;
6. Demonstrate a **working** knowledge of referral resources within the community;
7. Describe the internal dynamics of the congregation assigned to and the differences in the roles of priest, laity and the deacon;
8. What do the national and diocesan canons say about diaconal ministry?

The starting date of the Transitional Diaconal Experience will be the date of his/her ordination to the Diaconate, _____, and is to be completed by _____. A final report (vebal or written) will be given to the Archdeacon by _____.

The Transitional Deacon

The Archdeacon

Date:

Date:

Some useful Resources:

MANY SERVANTS by Ormonde Plater
 DEACONS IN THE LITURGY by Ormonde Plater
 BEING A DEACON TODAY: EXPLORING A DISTINCTIVE MINISTRY IN THE
 CHURCH AND THE WORLD by Rosalind Brown

Revised 5/21