



MANUAL *for the* ORDINATION PROCESS

commission on ministry
THE EPISCOPAL DIOCESE OF THE GREAT LAKES

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TO NEW INQUIRERS

We are grateful for your interest in serving the church through ordination as a deacon or priest. These are exciting times to be a disciple of Jesus, and the changing nature of the Church means that we need leaders who are bold, passionate about Christ and the Episcopal Church, entrepreneurial, grounded by a deep faith and robust spiritual life, animated by the love of God, and have a proven track record of organizing and leading others in mission and ministry. Deacons and priests in the 21st Century will need to be willing to explore new and innovative forms of ministry alongside traditional ways of being and doing church. The call is demanding. We hope you will find the journey richly rewarding.

This manual seeks to give a general overview of the process that leads toward ordination in the Episcopal Diocese of the Great Lakes. The process is long, and there are several steps along the way. Discernment begins at the local level; anyone seeking ordination should first be deeply rooted in a baptismal ministry in a local parish and living faithfully in Christian life. This includes a commitment to prayer and study; a commitment to serving others, both inside and outside the church; and a commitment to faithful stewardship of time, talent and treasure. Leading by example and doing what you teach is an important part of ordained ministry. You will be expected to speak to these and other personal practices in your discussions with the Commission on Ministry (COM). The process is not intended to be needlessly bureaucratic, difficult or mysterious. However, great trust is bestowed in ordination, and so the discernment process must be careful, thoughtful and deliberate.

A call to ordination is always a mutual call between the community and the individual; the process unfolds in ever-expanding circles of community (self, sponsoring priest, parish, diocese). *As much as we've tried, this manual will not answer all your questions. Please work closely with your rector or a COM member to ensure that this process flows as smoothly as possible.*

In the meantime, please be assured of our prayers for you as you continue to seek the guidance of the Holy Spirit.

- The Commission on Ministry

INTRODUCTION

This manual outlines the typical process of formation to serve in ordained ministry in The Episcopal Diocese of The Great Lakes (EDGL). The process is based on The Canons of the General Convention of the Episcopal Church (canons) while recognizing the unique aspects of our diocese. Title III (Ministry) of the canons addresses the ministry of all baptized persons, including ordained ministry. Canon 2 (III.2) establishes the formation of the Commission on Ministry (COM) to “advise and assist the bishop” in the implementation of Title III including the “design and oversight of the ongoing process for recruitment, discernment, formation for ministry, and assessment of readiness therefor.” Canon 6 (III.6) outlines the process for the ordination of deacons; Canon 8 (III.8) addresses the process for the ordination of priests; Canon 10 (III.10) addresses the reception of clergy from other Churches. If there is any discrepancy, the canons are the governing document (III.2.3).

The process outlined in this manual should not be viewed as an exercise of just “checking the boxes”; it is an intentional practice to develop the kind of leader God is calling to serve God’s Church. This is a holy time for listening deeply, both individually and in community, for how God is calling the inquirer to serve in The Episcopal Church (TEC) and whether ordination is the most appropriate option for responding to that call. Before proceeding in this process, the following items should be considered. The Inquirer...

- must be recognized as a confirmed adult Communicant in Good Standing, a regular worshipper, and a giver of record. (I.17.3,III.6.2,III.8.2,III. 10.3.a.2.iii).
- should have at least 18 months of active involvement/membership in their parish and be viewed as a leader by the general congregation. Active involvement includes activities such as vestry leadership, participating in licensed lay ministries, serving in/leading parish ministries, participating in parish events, serving as an acolyte, camp counselor, youth delegate, leadership in youth ministries, etc. Service at the diocesan level is also encouraged and will be helpful to the discernment process.
- is responsible for their entire process; they must ensure that the various steps of their process are completed on time, or risk having their process delayed or stopped. Tending to administrative details is a competency needed to serve in an ordained role.

Additionally, while a bachelor’s degree is not required to proceed, it is strongly recommended. If the Inquirer does not have a bachelor’s degree, additional academic work may be necessary to prepare to undertake a program of theological education (III.8.5.b). To be successful in these studies you must also be proficient in critical thinking, have strong research skills, strong verbal and written English communication skills, digital literacy (able to navigate online, use common software proficiently, etc.) and disciplined study habits.

Discernment of call will be ongoing throughout the process; you may be asked to do something not listed specifically in this manual or may be asked to step out of the process at any time if a call to ordained ministry is not supported by the bishop; everyone remains in the process at the discretion of the bishop. Written notice of removal from the process will be provided. (III.8.3.f).

This manual is intended to also function as a working document for you and the COM. Space has been included to track the completion of key activities. To enhance the flow of the manual, much important information has been placed in the Appendices. These are not “extra” documents; they contain

information key to understanding and navigating the ordination process. Therefore, do not ignore them!

The manual also serves as “one-stop shopping” for both the ordination and clergy reception processes. All forms (App. 8), a detailed discernment team process (App. 6), as well as the process & forms for clergy ordained in other denominations seeking reception as clergy in The Episcopal Church (App. 9) are included in this manual.

BAPTISM FORMS THE SOUL OF A MINISTER

By: The Rev. Dr. Randall Warren (with permission)

Ordination is based on the truth that baptism forms the soul of a minister. All of us, as the people of God, are called and empowered to do ministry. Traditionally the church has seen ministry in three categories: servant ministry, relationship ministry, and uniting ministry. All baptized people engage at various times in each of these ministries.

For example, when you volunteer at a soup kitchen or shelter, or help serve food at a parish dinner, you are engaging in servant ministry. When you give a neighbor a ride to the doctor or some other appointment, you are doing servant ministry. When you take food to a grieving person or someone recovering from illness, that is servant ministry. When you serve the outcast, the poor, or the downtrodden by advocating for more just social structures, that is servant ministry. When the Altar Guild and acolytes work diligently to enable the congregation's worship, that is servant ministry.

When, based on your Christian motivations, you help mediate a dispute between coworkers or family members, you are engaging in relationship ministry. When you encourage a sad friend, befriend an outcast, or welcome a parish visitor, that is relationship ministry. When you invite someone to join our ministry team or group that is relationship ministry. When you help a shut-in person feel connected through a phone call, card, or visit, that is relationship ministry.

When a Christian leads, forms, or unites a group because of their commitment to Christ, that Christian is exercising uniting ministry. Whenever you teach or promulgate the faith, you are exercising uniting ministry. This includes teaching a Christian Formation class for children, youth, or adults, or functioning as a baptismal or confirmation sponsor. When you call together a team to accomplish a task for your parish or, in the name of Christ, for your neighborhood, you are exercising uniting ministry. When you pay your pledge, you are exercising uniting ministry by facilitating and supporting the Christian group that is your parish and your diocese. When you chair a local, regional, or Churchwide committee you are exercising uniting ministry.

When we discern that someone is gifted at calling and teaching the Christian community to exercise servant ministry, we ordain that person a deacon. When we discern that someone is gifted at calling the Christian community to exercise relationship ministry, we ordain that person a priest. And when we discern that someone is gifted at calling the Christian community to exercise uniting ministry, we ordain that person a bishop.

All Christians, ordained and lay, exercise all three types of ministry. A lengthy and careful process of discernment and formation by the individual, the local Christian community (parish), and the broader Christian community (diocese) may lead to ordination.

The ordination is a recognition of the person's leadership potential and the whole community's (individual, parish, and diocese) sense of the Spirit's call to that person. It is not the deacon's job to do all the servant ministry in the Christian community. It is not the priest's job to do the relationship ministry in the Christian community. And it is not the bishop's job to do all the uniting ministry in the Christian community. It is rather the role of the bishop, priest, and deacon to be both a sign and call to the community of the category of ministry represented by their order. Their task is crucial precisely because baptism forms the soul of a minister, and we are all ministers in and of Christ.

INFORMAL PERSONAL DISCERNMENT

Before proceeding to the ordination process it's critical that you explore deeply how and where you believe God is calling you. This is the time to test your vocation initially in prayer and by participating in various ministry opportunities in your church and in the diocese. Appendix 2 is a list of resources to help in this exploration. None of these are required per se, but some may be beneficial. It would be appropriate to talk with your rector and/or spiritual director to see what resources and ministries they recommend based on your unique circumstances.

As you are discerning your call, it's important to recognize that The Episcopal Church believes that discernment is a life-long process and is not done in a vacuum. In the ordination process, discernment engages the church in ever-widening circles to help you assess your call. This is even required by the canons. At this stage, your role is to explore and be open to the moving of the Holy Spirit. We believe that a call to ordained ministry must be mutually discerned. That is, while you may feel led to be a priest or deacon, that call must also be discerned and confirmed in and by the wider church community. That includes your loved ones, your parish family, the Commission on Ministry, the Standing Committee and the Bishop as well as any others who are asked to participate in your process. This is not a decision you make alone.

The question that must be answered through this process is “must this person be ordained to fulfill their call or can they best serve God using their gifts as a lay person?” The focus is on serving God. While some are uniquely called to ordained ministry, most Christians are not called to serve Christ in this way and yet, are the heart, hands, and feet of Christ in this world. If a call to ordained ministry is not affirmed or needs more time, we realize that may be deeply disappointing. However, that is not a judgment on the person, their spirituality, or their value as a beloved child of God. In many ways, lay people have opportunities to minister to and influence others in ways that are not accessible to clergy. As you consider the people who have had the greatest influence on your faith, it's likely you were heavily influenced by people who were not in ordained ministry. The clergy are not more important or valued than the laity but they do have different roles. All orders are needed and valued and all Christians are called to some form of ministry. The question then is for us to discover together where we believe you can best serve God using your unique gifts and experiences to further God's kingdom. Let us move forward in humility and secure in the knowledge that the Holy Spirit is already at work doing more than we can ever ask or imagine. Thanks be to God!

PROCESS FOR DISCERNING A CALL TO ORDAINED MINISTRY

I. Inquirer

An inquirer is one who asks questions, is curious, and seeks information. That is the focus of this initial step of the ordination process. If, after your personal discernment, you desire to continue exploring if you are called to ordained ministry, the following are additional actions to take:

- 1. Attend a diocesan “Inquiry Overview” sponsored by COM.** This meeting, likely conducted online and offered twice a year, is open to all and will outline the steps of the ordination process, the role of COM, etc.

Date Attended: _____

- 2. Meet with your rector** (contact the COM chair if you are unsure who to contact). Topics to be discussed include, but are not limited to:
 - How are you discerning a call to ordained ministry? What has brought you to this moment? Describe your personal discernment process.
 - The ministries you have been involved in, both within the Church (congregation, diocese, province, etc.) and external activities. How have these experiences shaped your view of the role of the laity and ordained persons?
 - Provide evidence of baptism and confirmation. If evidence is not available, provide a statement attesting to receiving these sacraments with approximate dates.
 - Your understanding of the role to which you feel called.
 - Your regular spiritual practices, including a rule-of-life, examen, etc. (See Appendix 2).
 - A brief discussion of the process leading to ordination, including the Church’s and your financial responsibilities.
 - Spousal/Partner support, if applicable.

Date of Meeting(s): _____

If you and your rector mutually agree that a call to ordained ministry should be explored further, that you have participated in the activities outlined above to their satisfaction, and your rector agrees to be your sponsoring priest (see Appendix 3, Role of Sponsoring Priest), then you must complete the following steps:

- 3. Attend an Inquirer’s Orientation** with your sponsoring priest. You must attend this orientation together. If a last-minute emergency arises, your sponsoring priest must find a substitute. You cannot attend the orientation without clergy support. The purpose of the orientation is to learn even more about the ordination process.

Date Attended: _____

- 4. Engage with a Spiritual Director** who has been trained in an accredited program. Your spiritual director should not be your rector, sponsoring priest or friend. Appendix 4 describes spiritual direction. [A Spiritual Direction and Companionship Directory for our diocese is available here](#), although you are not limited to working only with spiritual directors listed in that space. Your relationship with your spiritual director is respected as a privileged one; your conversations are confidential. However, it’s important to keep your sponsoring priest informed of your continued engagement in spiritual direction. Typically, meetings with your spiritual director occur monthly. There is usually a fee for this support. Discuss this with your sponsoring priest and the spiritual director if this is a concern. Spiritual direction should continue throughout ordained life.

- 5. Personal Information Form.** Complete [Form 1](#) and provide it to your sponsoring priest. Include evidence of baptism and confirmation. (If evidence is not available, provide a statement attesting to receiving these sacraments with approximate dates.)

Date Submitted: _____

(Note: [Form 1](#) should be updated as your personal circumstances change so that your file remains current.)

- 6. Write your faith journey** and submit to your sponsoring priest. You must include the date of writing in the document. Your sponsoring priest will be required to input the date of writing in Step 8. Refer to [Appendix 5 Writing Your Faith Journey](#).

Date Completed: _____

- 7. Inquirer Packet.** Your sponsoring priest must send an “Inquirer Packet” to the bishop’s assistant and COM Chair. All required documents should be submitted via the Ordination Manual: Inquirer Packet Submission Portal available at forms.greatlakesepiscopal.org/com-inquirer-packet or by scanning the QR code below. This packet must include the following:



- a. A letter of support from your sponsoring priest addressed to the bishop. This letter should include pastoral knowledge of you and your family, understanding of call, individual spirituality, ability toward self-examination, character, areas of further growth and development, involvement in the life of the sponsoring congregation and demonstrated gifts for ministry.
- b. A letter of support from your parish’s deacon. Note: this applies only if you are exploring the diaconate and a deacon is serving in your home parish or if a deacon is serving in a mentoring capacity for you.

- c. Your Personal Information form (your sponsoring priest will upload the PDF of your completed form that you already submitted in Step 5), and
- d. Your faith journey narrative.

Date Completed: _____

- 8. Inquirer Packet review** by the COM and the bishop. An introductory meeting may be requested. (Note: if you were previously ordained in a denomination not in the historic succession, you must contact the bishop’s assistant to schedule an interview with the COM per III.10.4.b).

If a call towards ordination is not affirmed by COM and the bishop at this time, the process ends. Your sponsoring priest and congregation will support discernment until God’s call in your life becomes clearer. If the bishop and COM agree that further discernment toward a call to ordained ministry is appropriate at this time, you will be assigned a COM member to work with you throughout this process (“COM contact”).

The COM contact will:

- Be available to you and your sponsoring priest throughout the process to answer questions.
- Meet with you, the sponsoring priest, and the vestry to discuss the overall ordination process and the role of the vestry.
- Attend the first discernment team meeting and review the roles/purpose of the discernment team.
- Accompany you on the journey, keep COM informed on your progress, and schedule times for you to meet with COM.

The COM contact will NOT:

- Be responsible for your process or prompt you to submit the various requests/letters/forms etc. that are a part of the process.
- Be a mentor or spiritual director.

COM Contact Name: _____

If you are a current vestry and/or Standing Committee member, in order to proceed in this process, you will need to resign from these positions. This is to avoid a conflict of interest and allow you space for continued discernment.

- 9. Provide all educational and/or vocational transcripts and relevant certifications** from all your post-secondary education (or proof of high school/GED completion if no post-secondary education) and employment experiences (past or present). This should include your DD214 (if military) or proof of any non-degree theological coursework completed within the last 5 years. Your COM contact and sponsoring priest will be notified when you have submitted

all transcripts and documents. You must submit these documents via the Ordination Manual Educational and Vocational Transcript and Certification Submission Portal available at forms.greatlakesepiscopal.org/com-transcripts-certs and via the QR code below.



Date Completed: _____

A note about your file: A personnel file will be maintained in the diocesan office. It is your responsibility to ensure that all necessary documents are provided to the bishop’s assistant for inclusion in your file. This includes documents generated by others (COM, Standing Committee, vestry, sponsoring priest, bishop, training records, etc.). These records will not be automatically included in the folder; you must submit them via the forms and packet submission portals linked in this document. When using the online forms and submissions portals, you will automatically receive a copy of your submissions. **You should retain these copies.** The COM, the Standing Committee, and the bishop will have access to your file.

The following documents will be retained in a secured confidential file: psychological evaluation, credit check, medical evaluation, and background check. This file will be accessible only to the bishop, COM chair(s) or their representative(s), and the Standing Committee president or their representative. You may view your file at the diocesan office at any time; contact the bishop’s assistant to make an appointment.

- 10. Meet with vestry and COM contact.** Your sponsoring priest will schedule this meeting typically as part of a vestry meeting. Your COM contact will present the ordination process and vestry responsibilities. This meeting may take up to an hour and you are encouraged to attend.

Vestry Meeting Date: _____

- 11. Begin the formal discernment process** as outlined in [Appendix 6](#). Your sponsoring priest will initiate discussions with you about forming the discernment team. This step ends when the following steps are completed:

- a. The discernment team report is sent to you and your sponsoring priest.

Date Received: _____

- b. You send your current faith journey narrative (incorporating discernment team feedback, if needed) to your sponsoring priest.

Date Sent: _____

- c. You send to your sponsoring priest a “discernment reflection” explaining your key learnings from the discernment process (no more than 2 pages). Questions to consider may include how the experience of team discernment was for you? Did your experience of the process change over time? What surprised you? With what are you continuing to wrestle? What changes have/will you make based on your discernment team experience? Be sure to include the date of writing in this file. You will need it in step 12.

Date Sent: _____

- 12. Send discernment packet.** Create a “discernment packet” to submit via the Ordination Manual Discernment Packet Submission Portal, available at the QR code below and at forms.greatlakesepiscopal.org/com-discernment-packet.

This packet must include the following:

- a. Discernment team report signed by all members of the Discernment Team (note: there is no separate signature page);
- b. Faith journey narrative; and
- c. Discernment reflection paper



Date Completed: : _____

- 13. Meet with the vestry.** Your sponsoring priest/rector will provide the discernment packet to the vestry and schedule a vestry meeting to discuss your completed discernment materials. You may be asked to participate in this discussion. After reviewing the materials, the vestry will determine if they affirm a call towards ordination and agree to nominate and support you to continue in the ordination process. If so, they must complete the *Nomination for Ordination* form per III.6.2.a/III.8.2.a ([Form2](#)) and send it to you.

Date Completed: : _____

- 14. Reply to the vestry** in writing accepting their nomination (III.8.2.b). Be sure to date your letter. You will need to input the date of your acceptance letter when you submit your nominee packet.

Date Completed: : _____

- 15. Send Nominee packet** containing the following documents (“Nominee Packet”) via the Ordination Manual: Nominee Packet Submission portal available at the QR code below and forms.greatlakesepiscopal.org/com-nominee-packet

This packet must include the following:

- a. The vestry *Nomination for Ordination* form ([Form 2](#))
- b. Your letter of acceptance. Note: per III.6.6.a/III.8.7.a.1, at least eighteen months must transpire from the time of written acceptance until ordination to the diaconate.



- 16. COM interview.** The COM contact will arrange for you to meet with COM. The COM will engage with you regarding your discernment thus far. You will be asked about a broad range of personal, educational, and spiritual topics. One personal area you will be asked to address is any patterns of addictive behaviors and recovery, including but not limited to alcohol and drug use.

Date of Meeting with COM: _____

COM may determine that additional discernment is needed. If so, you will be asked to meet with your COM contact, other COM representatives, and your sponsoring priest to design a supplemental discernment plan. Upon completing the supplemental plan, you will be asked to write a 2-3-page review/reflection of this additional work and may be asked to meet with COM again.

- ❑ **17. Nominee determination.** Following the meeting with COM, the COM chair will send a recommendation to the bishop regarding next steps. The bishop may choose to meet with you. The bishop will determine if Nominee status will be granted and will send a determination letter to you and the COM chair.

Date of Meeting with COM: _____

II. Nominee

In this phase you will provide more personal information (III.6.5.j/III:8.6.k) and begin considering educational institutions. You should continue to meet with a Spiritual Director.

Nominee Requirements:

- 18. Contact the bishop’s assistant** to initiate the following processes. You will need to provide the bishop’s assistant with your SSN and a copy of the front and back of your driver’s license. If preferred, this may be done in person by making an appointment. This personal data will be kept in a locked safe separate from the personnel file.

- a. Background check release-of-information form to sign and return. The bishop’s assistant will arrange for the background check (at the diocese’s expense). The bishop’s assistant will inform you and COM when the background check has been completed, and the results have been placed in your file.

Date Completed: : _____

- b. Medical Evaluation form. You will bear the expense of this exam. Send the completed form to the bishop’s assistant and inform your COM contact. Even if the completed form is being sent by the medical provider, it is your responsibility to ensure that the form is received by the bishop’s assistant.

Date Completed: : _____

- c. Credit check authorization form to sign and return. The diocese will bear the expense for this.

Date Completed: : _____

- d. The bishop’s assistant will initiate the psychological evaluation when requested by COM. You will then be contacted by the service provider to schedule the evaluation. The cost for this may be shared with the diocese.

Date Contacted by Provider: : _____

Evaluation Date: : _____

- 19. Personal Financial Review** – Complete [Form 3](#) (which will be sent to the bishop’s assistant and your COM contact) and discuss it with your sponsoring priest. This information is needed to demonstrate that you have a solid grasp on personal finances, including any significant financial impediments that would bar or hinder your progress toward ordination. Completing this review requires developing a spending plan to estimate the amount of debt you may incur and/or identify potential changes in lifestyle that you may need to make as part of this process toward ordained ministry.

You may find it useful to use the “Planning-Postulant Cash Flow Analysis Worksheet” [available on the Church Pension Group \(CPG\) website](#).

Use of this CPG worksheet is optional, but [Form 3](#) is required. You should expect your sponsoring priest, the bishop, and/or the COM to ask you and your spouse/partner about your understanding of the financial implications of pursuing ordination (III.8.3.a.3)

Date Completed: : _____

- 20. Confirm with the bishop's assistant** that all the documents listed in steps 18 and 19 are in your file and if so, request a meeting with the bishop (III.8.3.a.2).

Date of Meeting with Bishop: _____

- 21. COM postulancy interview.** If the bishop approves proceeding, your COM contact will request a COM postulancy interview. (III.8.3.b)

Date of Meeting with COM: _____

- 22. A COM recommendation** will be sent to the bishop. (III.8.3.b)
- 23. Postulancy determination.** The bishop will determine if postulancy status will be conferred. You will receive a letter notifying you of the bishop's decision.

Date Completed: : _____

III. Postulancy

Postulancy is the time to begin your formal theological education and formation at a diocesan institution, a low-residence/distance learning school, or a residential seminary. It involves continued exploration of and a decision about your call (III.6.3/III.8.3). It is also a time when your relationship with the bishop expands. In addition to writing ember day letters, you should inform the bishop of significant life changes, including things such as a job change, a change in marital status, significant losses, etc., as these can have a impact on discernment and formation.

Postulancy Requirements:

- ❑ **24. Apply for and begin formal theological education.** The COM and the bishop will initiate conversation with you regarding options for your formal theological education and formation. Education options vary depending on whether you are pursuing ordination for the diaconate or priesthood. Your preference of educational institution must be approved by the bishop.

Apply for financial aid, as appropriate. Decisions regarding the amount of diocesan financial support for individuals studying for ordination are made annually by the bishop/ecclesiastical authority in consultation with COM. The amount awarded will be based on a variety of factors including but not limited to financial need, level of funding available to be accessed from diocesan budget and designated funds, and number of individuals in process at the time of allocation. Unless specifically stated, an amount awarded in any one year should not be interpreted as a guarantee of receiving the same level of financial support for future years. Any questions regarding the timing and process of diocesan scholarships/financial assistance being disbursed, following the bishop's decision, should be addressed to the Chief Financial Officer. Scholarships are also available through TEC - [Educational Scholarships – The Episcopal Church](#)

- ❑ **25. Apply for and begin Clinical Pastoral Education (CPE).** One unit of CPE with an accredited ACPE program is required for ordination to either the priesthood or the diaconate. Accredited programs can be found at acpe.edu/programs. The availability of CPE programs is limited; it's recommended to begin the application process early. You must bear the expense of CPE. If participation in the ordination process ends for any reason, you will not be reimbursed by the diocese for this expense. Keep your sponsoring priest and COM contact informed of your CPE activities.

- ❑ **26. Write Ember Day Letters.** Per III.6.3.e/III.8.3.e each postulant shall, until final ordination, communicate directly with the bishop four times a year, in the Ember Weeks. Ember Days occur the Wednesdays, Fridays, and Sundays after

- The First Sunday in Lent
- The Day of Pentecost
- Holy Cross Day (September 14)
- St. Lucy's Day (December 13)

Ember Day letters should include updated reflections on academic, personal, spiritual, and practical growth. This is not the place to ask questions about your ordination process. Suggestions on what to include in an Ember Day Letter:

- Major and minor life updates (how you and your family are doing)
- Ministry updates (involvement in your church or other faith communities)

- Formation updates (including but not limited to, your academic work)
- What you've read recently aside from required school assignments
- Spiritual update (the quality of your prayer life, for example)

Letters should be concise and limited to 1-2 typed pages, if possible, without leaving out anything critical. All letters are to be submitted via the Ember Day Letter Submission portal available by scanning the QR code below or by visiting forms.greatlakesepiscopal.org/ember-day-letter.



- ☐ **27. Complete training** listed below which is available through the diocese. *Training records are not automatically flagged for your file.* Submit the documentation of completed training through the Ordination Manual Postulant Training Packet Submission Portal available via the QR code to the left and at forms.greatlakesepiscopal.org/com-ptraining-packet.



- ☐ a. Title IV (III.8.5.h).

Date Completed: _____

- ☐ b. Becoming Beloved Community: Dismantling our Divisions (III.8.5.h).

Date Completed: _____

- ☐ c. Safe Church (Children & vulnerable adults), including civil requirements for reporting and pastoral opportunities for responding to evidence of abuse (III.8.5.h)

Date Completed: _____

- ☐ d. LGBTQ+ Cultural Competency training.

Date Completed: _____

- ☐ e. Community Organizing training (if not part of the educational institution's curriculum). Note: this may be completed during either the Postulancy or Candidacy step.

Date Completed: _____

- 28. Obtain annual reports** from the theological educational program of formation (III.8.5.j) or from those authorized by COM to oversee the evaluation program (III.6.5.i). The seminary or other formation program must provide annual reports indicating your academic and personal progress. It's your responsibility to request and provide these reports to the bishop's assistant and your COM contact via the Seminary/Formation Annual Report Submission Portal, available at forms.greatlakesepiscopal.org/formation-annual-report or at the QR code below. It would also be appropriate to review your status with your sponsoring priest.



- Year 1 report submitted
- Year 2 report submitted
- Year 3 report submitted

Submit Year 3 when received; it's recognized this might not occur prior to ordination.

- 29. Begin Field Placement.** The timing of field placement may vary based on the theological/educational institution. A minimum of one year of field education is required by COM, but some educational institutions may have more stringent requirements, in which case those requirements must be met. Field placement will not be conducted in the postulant's home church except under extenuating circumstances. Exceptions must be reviewed by COM and approved by the bishop in advance.
- 30. Application for Candidacy.** After satisfactorily completing the above requirements and beginning the last year of theological education and formation, apply for Candidacy. Submit the Candidacy Packet via the Ordination Manual: Application for Candidacy Submission Portal available at the QR code below and at forms.greatlakesepiscopal.org/com-c-app-packet.



- a. Application for Candidacy form ([Form 4](#)) - (III.8.4.a).
- b. Certification for Candidacy form ([Form 5](#)). You will need to request that your vestry and rector complete this form and send it to you. (III.8.4.a.2)

Date Completed: _____

- 31. COM confirmation.** After receiving the above information, COM will send a letter to the Standing Committee attesting to your continuing formation, confirming that all documentation is in order, and indicating that you are ready to be interviewed for Candidacy. (III.8.4.b)

Date Sent: _____

- 32. Standing Committee interview** (III.8.4.b). If all documents are received and there are no issues, the Standing Committee will contact you for your candidacy interview. The Standing Committee and the bishop must both approve granting Candidacy status. After your interview, the Standing Committee will inform the bishop of their decision.

Date of Interview: _____

- 33. Candidacy determination.** If the bishop concurs with the Standing Committee's decision to grant Candidacy status, you will receive a letter from the bishop attesting to your status as a candidate for Holy Orders (III.8.4.b). If Candidacy is denied, the bishop and COM will communicate next steps for your process.

Date of Letter: _____

IV. Candidacy

Candidacy is the time to complete all the requirements needed for ordination. That includes finalizing your theological education, completing field placement assignments and CPE. Candidacy is also the time for final exams and for all candidates to apply for ordination to the diaconate. In the Spring of your last year of education/formation you should be in communication with the Transition Officer regarding discernment processes for your first call to ordained ministry.

Candidates with a call to the priesthood must be ordained a deacon (“transitional”) and serve for at least six months before being ordained a priest [III.6.a.]. According to the canons, at the time of ordination to the diaconate...

- you must be at least 24 years of age,
- at least 18 months must have transpired from the time of written acceptance of nomination by the nominee, and
- medical, psychological and background checks must have been completed within the last 36 months (3 years). If any of these are more than three years old at the scheduled date of your ordination, they will need to be updated. (III.8.5.k)

Candidacy Requirements:

- ❑ **34. Transitional deacon candidates: Complete General Ordination Exams (GOE’s).** GOE’s are offered annually in the 1st week in January. These should be taken in the final year of theological education and formation. These may be set up by the seminary. If not, notify your COM contact by Dec. 1 in your third year. In that case, the bishop’s assistant will submit the names of students to participate in the upcoming GOE’s. You will receive notification from the examining board regarding exam logistics. It might take up to two months to receive the results which will also be provided to the bishop’s assistant. The COM will be responsible for arranging remediation concerning any areas in which your answers were deemed “not proficient” by the Examining Chaplains.

Exam Dates: : _____

- ❑ **Diaconate candidates:** COM will arrange for a comprehensive exam addressing the categories listed in III.6.5.f. COM will contact those in charge of the program of preparation for the diaconate to provide a written report assessing your progress toward completion of the formation program and readiness for ordination. This report must include a recommendation regarding your readiness for ordination. This report will be sent to COM who will share the results with you. Records shall be kept of all evaluations, assessments, and the recommendation. (III.6.5.i)

Exam Dates: : _____

- ❑ **35. COM chair informs the Transition Officer** of Candidates who may be ordained to the diaconate within the next six months.

Date of Contact: _____

- 36. Send “Deacon Packet”** via the Ordination Manual: Deacon Packet Submission Portal available at forms.greatlakesepiscopal.org/com-deacon-packet or by scanning the QR code below.

Date Sent: _____



The Deacon Packet must contain:

- a. A certificate from seminary or other program of formation showing your scholastic record in the subjects required by the canons, including an evaluation with recommendation as to your other personal qualifications for ordination [III.6.6.b.4/III.8.6.c.4]
- b. Documentation of field placement completion
- c. Documentation of CPE completion
- d. Completed *Application for Ordination to the Diaconate form* ([Form 6](#)) – (III.8.6.c.1.)
- e. Completed Certificate for Ordination to the Diaconate form ([Form 7](#)) - (III.8.6.c.2). This must be signed by your vestry and rector. It’s your responsibility to request this.
- f. Confirm completion of Community Organizing training.

Date Completed: _____

- g. Confirm in the portal submission form that the following documents have been completed within the last 36 months (3 years) (III.8.5.k). If any of these will be more than three years old at the scheduled date of your ordination, contact the bishop’s assistant to initiate updating these documents.
 - 1. Medical exam **Date of Last Exam:** _____
 - 2. Psychological exam **Date of Last Exam:** _____
 - 3. Background check **Date of Last Check:** _____
 - 4. Safe Church **Date Completed:** _____
 - 5. Becoming Beloved Community: Dismantling our Divisions

Date Completed: _____

- 37. COM review/recommendation.** COM reviews the Deacon Packet and provides the Standing Committee and the bishop with the documentation confirming that all the canonical requirements for ordination to the diaconate have been met and including a recommendation regarding ordination (III.6.6.b.5/III.8.6.c.5). Records of all evaluations, assessments, and the recommendation, shall be made available to the Standing Committee (III.6.5.i).

- ❑ **38. Standing Committee review.** The Standing Committee is responsible for completing the Testimonial for Ordination to the Diaconate (Form 8) or Testimonial for Ordination to the Diaconate (Transitional) (Form 9) certifying that all the canonical requirements have been met, that there are no objections on medical, psychological, moral, or spiritual grounds; and recommending ordination. Standing Committee members may review your file to make this determination. A majority of Standing Committee members must sign the form consenting to ordination. (III.8.6.d)

- ❑ **39. Ordination to the diaconate.** If the bishop has no sufficient objection on medical, psychological, moral or spiritual grounds, the bishop may ordain you to the diaconate (III.8.6.e). The bishop will consult with you and your sponsoring priest to schedule a date for ordination. On occasion, there are diocesan-wide ordinations of more than one person held at a specifically chosen location. The bishop will consult with you regarding your post-ordination call. Your process ends here if you are ordained to the vocational diaconate. If you are ordained a transitional deacon, your process continues in Section V.

V. Transitional Deacon

Those called to the priesthood must be ordained to the diaconate and serve as a transitional deacon for at least six months (III.8.6.a, III.8.7). Deacons who subsequently express a call to the priesthood must apply to the bishop and COM who will ensure that the deacon meets the formational requirements set forth in III.8.5.g. Additional steps may be required.

If you are ordained a transitional deacon after seminary, oversight for this last phase of formation will be provided by the priest in charge of the congregation or organization into which you have been called to serve.

If you are ordained a transitional deacon while still in seminary, the existing relationships with your sponsoring parish and sponsoring priest still apply; in addition, the bishop and the seminary will create a plan for your supervision as a transitional deacon at the seminary.

According to the canons, at the time of ordination to the priesthood...

- you must be at least 24 years of age (III.8.7.a.2),
- at least 18 months must have transpired from the time of written acceptance of nomination by the nominee (III.8.7.a.1), and
- medical, psychological and background checks must have been completed within the last 36 months (3 years) -III.8.7.a.3. If any of these will be more than three years old at the scheduled date of your ordination, they will need to be updated.

Transitional Deacon Requirements:

- 40. Upon completion of any remedial work for GOEs or 60 days after ordination to the transitional diaconate, send “Priest Packet”** containing the following documents via the Ordination Manual Priest Packet Submission Portal available at forms.greatlakesepiscopal.org/com-priest-packet or by scanning the QR code below.



Date Sent: _____

- a. Proof of CPE completion.
- b. Completed *Application for Ordination to the Priesthood* ([Form 10](#)). (III.8.7.b.1)
- c. Completed *Certification for Ordination to the Priesthood* ([Form 11](#)) (III.8.7.b.2). This be completed by the rector and vestry at the church where you’ve been serving as a deacon.
- d. Confirm in the portal submission form that the following exams/training have been completed within the last 36 months (3 years). (III.8.7.a.3). If any of these will be more than three years old at the scheduled date of your ordination, contact the bishop’s assistant to initiate updating these requirements.
 - 1. Medical exam **Date of Last Exam:** _____
 - 2. Psychological exam **Date of Last Exam:** _____

3. Background check **Date of Last Check:**_____

4. Safe Church **Date Completed:**_____

5. Becoming Beloved Community: Dismantling our Divisions

Date Completed:_____

- 41. COM review.** COM will review the Priest Packet and provide the Standing Committee and the bishop with documentation attesting to the successful completion of the program of formation designed during Postulancy (III.8.5), proficiency in the required areas of study, and recommending ordination to the priesthood (III.8.7.b.5).
- 42. Standing Committee review.** The Standing Committee must consent and certify that the canonical requirements for ordination to the priesthood have been met, that there are no objections on medical, psychological, moral, or spiritual grounds, and that they recommend ordination by completing the Testimonial for Ordination to Priesthood ([Form 12](#)) (III.8.7.b.5.c). Standing Committee members may access your file for this certification. A majority of Standing Committee members must sign the form consenting to ordination to the Priesthood. The form must be sent to the bishop’s assistant who will forward it to you and the bishop.
- 43. Accept call as priest.** To be ordained you must first be appointed to serve in a Parochial Cure within the jurisdiction of this Church, a Missionary under the Ecclesiastical Authority of a Diocese, an officer of a Missionary Society recognized by the General Convention, a Chaplain of the Armed Services of the United States, a Chaplain in a recognized hospital or other welfare institution, or as a Chaplain or instructor in a school, college, or other seminary, or with other opportunity for the exercise of the office of Priest within the Church judged appropriate by the Bishop. (III.8.7.e)

After accepting a call, you and the bishop will determine a date and place for your ordination. If you have been serving in a congregation as deacon your priesthood ordination may occur there. On occasion, there are diocesan-wide ordinations of more than one person held at a specifically chosen location.

APPENDIX 1: ACRONYMS & DEFINITIONS

Bishop's Assistant: Diocesan staff position.

Contact Information:

Phone: 616-616-3520.

Email: angela@greatlakesepiscopal.org.

Office: Episcopal Diocese of The Great Lakes, 124 N. Fayette St., Saginaw, MI 48602

Candidate/Candidacy: The 4th phase of the ordination process which occurs during the final year of theological education. This is when all the requirements for ordination are completed.

COM: The Commission on Ministry. This group of laity and clergy oversees the ordination process and advises the bishop throughout the process.

COM Contact: A COM member assigned to you who will be a resource to you and your Sponsoring Priest throughout the process. (Step 8)

Communicant In Good Standing: “All Members of this Church who for the previous year have been faithful in corporate worship, unless for good cause prevented, and have been faithful in working, praying, and giving for the spread of the Kingdom of God.” (I.17.3)

CPE: Clinical Pastoral Education. Education to teach pastoral care to clergy and spiritual care providers. (Step 25)

Discernment to God's Call: Process of reflection that leads a person to understand God's call at a given time or in particular circumstances. Involves listening to God through prayer and meditation, scripture, personal experiences, and other people.

Education: Involves formal instruction and the acquisition of knowledge, skills, and values.

Ember Day letters: Letters written to the bishop beginning at Postulancy and continuing through final ordination. (Step 26)

Examen: A practice of prayerful reflection on the events of the day to detect God's presence and discern God's direction for our life. [The Daily Examen - IgnatianSpirituality.com](http://TheDailyExamen-IgnatianSpirituality.com)

Faith Journey: A 4-5 page summary of how God has moved in and through your life. (Step 6, App.5)

Field Placement: Practical training and experience (III.6.5.f.5). (Step 29)

Formation: The shaping of a person's character, beliefs, and personal development.

GOE: General Ordination Exam. Required exams for priesthood candidates. Occurs in January of the final year of theological education. (Step 34)

Inquirer: The initial step in the process that begins with openness to explore holy orders.

Inquirer's Orientation: An in-depth COM led session for inquirers seriously considering holy orders. This must be attended by both the Inquirer and their Sponsoring Priest. (Step 3)

Inquirer's Overview: A COM led online overview of the ordination process open to all explaining the general steps of the ordination process. (Step 1)

Nominee: The 2nd phase of the ordination process. Occurs after accepting a nomination for ordination by a congregation or faith community AND granted admittance to the ordination process by the bishop.

Postulant/Postulancy: The 3rd phase of the process. The time between nomination and candidacy when formal theological education begins.

Rule of Life: A set of guidelines and commitments developed to deepen your spiritual life. (Step 2). More information can be found in the [“Living Intentionally” document from The Episcopal Church](#).

Standing Committee: The bishop's council of advice. The ecclesiastical authority of the diocese in the absence of a bishop. Responsibilities include recommending Candidates for ordination.

Spiritual Director: Someone formally trained in an accredited spiritual direction program. They help you pay attention and respond to God's personal communication, helping you grow in intimacy with God and others. (Step 4)

Sponsoring Priest: Typically, the priest or priest-in-charge of your faith community, or as determined by the bishop. The priest who guides you in the process towards ordination. (App 3)

Transitional Deacon: Those called to the priesthood must serve as a deacon for at least six months before being ordained to the priesthood.

Transitions Officer: A diocesan staff role that oversees ministry transitions, clergy placement and deployment.

APPENDIX 2: RESOURCES FOR PERSONAL DISCERNMENT

Engage in Spiritual Practices:

- Centering Prayer. A good resource is *Open Mind, Open Heart - 20th anniversary edition*. Thomas Keating. ISBN: 0826418899 (paperback) or ISBN13: 9780826418890 (hardback)
- Pray the Daily Office. To understand how to navigate the Daily Office and the Daily Office Lectionary, [here's a link to a 5- part series on YouTube called "Daily Office Basics"](#) by Deacon Rodger Patience of the Diocese of Fond du Lac. The videos are 8-15 minutes each and include some history and practical tips.
- [Rule of life](#)
- The Daily Examen: [The Daily Examen - IgnatianSpirituality.com](#)
- Spiritual Direction: [A Spiritual Direction and Companionship Directory for our diocese is available here](#). Please note that you are not limited to the Spiritual Directors in this directory.

Be Involved at the Parish/Diocesan Level:

- Confirmation classes -if not already confirmed or received into The Episcopal Church
- Lay licensing ministries- preacher, worship leader, Eucharistic minister, Eucharistic visitor, etc.
- Leadership/Involvement in parish activities - vestry, education & formation, outreach & social justice activities, etc.
- Participate in diocesan governance - Standing Committee, Diocesan Council, General Convention deputy, Diocesan Convention delegate, participation in mission region activities, etc.

Participate in Studies/Classes:

- Education for Ministry (EfM) - a four year, small-group formation program based on study and practice in theological reflection. Offered by the School of Theology of the University of the South.
- EfM Wide Angle - a 1 year introductory theological education course offered by The Episcopal Church
- Participate in Community Organizing training

Readings/Books for Personal Study/Reflection:

- *A Hidden Wholeness: The Journey Toward an Undivided Life*. Parker J. Palmer Jossey-Bass Inc. 2004. ISBN: 0787971006/9780787971007.
- *BCP* - become familiar with the BCP and other authorized worship services. Reflect on the Baptismal Covenant, the Catechism re The Ministry, the services for Ordination of a Priest, Ordination of a Deacon, etc.

- *Being Disciples: Essentials of the Christian Life*, Rowan Williams. Eerdmans. 2016. ISBN: 0802874320/978-0802874320. A short, beautifully written book by the former Archbishop of Canterbury. Williams explores four central practices that have always grounded Christian life, including baptism and prayer. His writing is wise, gentle, and deeply human. Perfect if you want something brief but substantial.
- *Called or Collared: An Alternative Approach to Vocation*. Francis Dewar. SPCK 2000. ISBN: 0281053502. Written for all lay people, including those considering ordination, this new edition, which takes into account changes since the ordination of women to the priesthood, is itself a call for everyone to discover their unique journey.
- *Church Meets World*. Winnie Varghese. Morehouse Publishing. 2016. ISBN: 0819232718/978-0819232717.
- *Discernment: Reading the Signs of Daily Life*. Henri Nouwen. HarperOne. 2013. ISBN: 0061686158/978-0061686153.
- *Simply Christian: Why Christianity Makes Sense*. N.T. Wright. HarperOne. 2010. ISBN: 0061920622/978-0061920622 A modern classic that revisits what Christianity is really about - and why it still matters. Wright builds a thoughtful, reasoned case for faith that stays rooted in the Anglican tradition while engaging contemporary questions.
- *Let Your Life Speak*. Palmer, Parker. Jossey-Bass. 1999. ISBN: 0787947350.
- *Walk in Love: Episcopal Beliefs and Practices*. Gunn, Scott and Melody Wilson Shobe.(Forward Movement, 2018). ISBN: 9780880284554.

Diaconal Readings

- [Association of Episcopal Deacons](#)
- *Diakonia*, Dani Gabriel; A free ebook focused on interviews with deacons available online at Episcopal Café. [Diakonia: Dani Gabriel – Episcopal Cafe](#)
- *Unexpected Consequences – The Diaconate Renewed*, Susanne Watson Epting. Morehouse Publishing. ISBN: 9780819229793

APPENDIX 3: THE ROLE OF THE SPONSORING PRIEST

Normally the sponsoring priest will remain the same during your process and will provide a pastoral presence. It is important for you to maintain close communication with your sponsoring priest throughout your process.

The sponsoring priest's role is to:

- Engage with you about your discernment and the faithful use of your gifts and experience, including but not limited to, how that relates to lay, diaconal or priestly ministry.
- Engage you in study/discussions about the ordination vows, baptismal vows, familiarity with the Bible and the Book of Common Prayer. This includes exploring your grounding in the Anglican tradition and recommending resources and activities to strengthen your knowledge, if appropriate.
- Pastorally support you whether or not a call to ordination is mutually discerned.
- Attend the Inquirer's Orientation with you.
- Send the Inquirer Packet to the bishop's assistant and COM (see step 7). The sponsoring priest must approve and support the nomination for the process to move forward.
- Suggest ways that you can be involved in various church ministries and provide resources to help you further discern and become more familiar with Episcopal identity and spiritual resources.
- Consult with you on your faith journey, including your Rule of Life and spiritual practices including examen and praying The Daily Office.
- Meet with you, the vestry, and COM contact to review the overall ordination process and the role of the vestry.
- Work collaboratively with you and your COM contact to identify members for a discernment team. May help you set up the initial meeting of the discernment team. The sponsoring priest will also attend the first orientation meeting of the discernment team. The sponsoring priest will not attend "working" meetings of the discernment team.
- Care for individuals seeking ordination, as well as spouses and other family members, during the exciting, challenging, and sometimes stressful period of discernment that precedes further formation.
- Submit reports and letters as required throughout the process.
- Receive notification from the bishop of your change in status (nominee, postulant, candidate, etc.) and inform the vestry.
- Meet with you as needed to discuss the process, questions, or concerns that arise during your journey to ordination.

- Communicate with COM as appropriate.
- Keep the vestry and congregation informed on your progress in the process and encourage involvement of both the congregation and vestry members in supporting you throughout the process. For example, they may suggest you be in contact with your sponsoring congregation by providing newsletter articles, letters to vestry, etc.

The sponsoring priest will NOT:

- Be responsible for your process or prompt you to submit the various requests/letters/forms etc. that are a part of the process.
- Be your spiritual director.
- Serve on your discernment team.

APPENDIX 4: SPIRITUAL DIRECTION

The source of this document is the website of Soul Care Seattle@The Layne, 1252 16th Ave. E. Seattle, WA 98112. Website: Soulcaresattle.com. It is included here because it provides a brief description of Spiritual Direction. It is not intended to serve as an endorsement of their services.

Spiritual Direction

What is it?

There exists much confusion about exactly what is and what is not spiritual direction. As many search new spiritual paths, the term “spiritual direction” has grown to be very fashionable, especially in protestant circles. From websites for churches and therapists to casual conversations between friends, the term spiritual direction flows freely. Regardless of how the term is currently used in Christian circles, the art and practice of spiritual direction is very well defined:

“Help given by one Christian to another which enables that person to
pay attention to God’s personal communication to [them]
to respond to this personally communicating God,
to grow in intimacy with this God,
and to live out the consequences of the relationship.”

William A Barry and William J. Connolly
The Practice of Spiritual Direction

In practice, this definition gets built out more specifically. It is about relationship:

- It is usually a specific, continuing relationship with a trusted guide for an expressed purpose, the purpose of growing intimacy, relationship with the divine
- The spiritual direction relationship focuses on the “directee’s” experience of their relationship with God and God’s relationship with them.
- Spiritual direction works from the assumption that the relationship is going somewhere: deepening, shaping, enlivening. It asks the question, “What is God’s relationship with you and your relationship with God inviting you to?”
- More importantly, the real spiritual director is God. As spiritual directors, we do not get involved with problem solving, counseling, and advice giving. Rather through paying attention to the “directee’s” relationship with God, directors help directees respond to God’s invitation of deepening relationship.

Who spiritual direction [is] for:

Generally speaking, spiritual direction is for anyone. Spiritual direction is a place to bring your longings, when life’s questions are no longer satisfied by the things of daily life. Spiritual direction is for the person who believes there must be something more. This is especially true during specific seasons of life. Perhaps the most universal reason for seeking to begin in spiritual direction is an interior sense that God is inviting oneself to deeper relationship. Other commonly expressed reasons for people entering spiritual direction are seasons of change, seasons of loss, and seasons of

discernment. Often we need another person to help us be silent, and to help see what we do not see so easily.

What should I expect?

This is an hour that is set aside for you. It is a time for you to share with your spiritual director what you are experiencing with the Triune God. Together in silent prayer, we will have time to listen to the Holy Spirit. As directors, we will prayerfully ask questions that will allow you to explore where God is working and what you hear [God] saying to you. We will not be teaching or counseling, but we will be praying and listening. We may highlight themes or offer some insights as you share your prayer life with us. It truly is an hour of prayer and a time of discovering our Creator.

What is spiritual direction about?

Perhaps somewhat surprisingly, spiritual direction is not about the director, nor is it necessarily about the person seeking direction (“the directee”). Spiritual direction is about the relationship God has with the directee and the relationship the directee has with God. As we move in relationship toward God, we begin to see that God is already moving toward us.

...We throw open our doors to God and discover at the same moment
that [God] has already thrown open [God’s] door to us.”

Romans 5:1-2, *The Message*

Soul Care Seattle@The Layne
1252 16th Ave. E. Seattle, WA 98112
Website: Soulcaresettlle.com

APPENDIX 5: WRITING YOUR FAITH JOURNEY

A faith journey is a written narrative, sharing in a compelling way, how you have perceived God moving in and through your life. A faith journey is written with the idea of thinking about and speaking to significant events, people, and places that have influenced your relationship with God. It is not an autobiography. Your faith journey should be no more than 4-5 pages double spaced. In-depth interviews will be a part of later phases of the process, so all details are not needed in the faith journey narrative; greater details can be presented later.

What should a faith journey “Say?” First, know that there are no “right” or “wrong” answers. It is your story and will not look like anyone else’s. Your personal story will help those journeying with you to understand and work with you during your discernment. It will be updated and changed as you move through this process.

Below are some suggestions to reflect on before you begin your writing. Make notes and don’t be surprised at all the ways God is working with you through this process!

- Do you have a spiritual thread or bible story you identify with?
- What is your spiritual practice for talking and listening to God and how has that influenced your faith journey?
- How has your faith matured over time (e.g. epiphanies, gradual enlightenment/learnings)?
- Which church traditions have you attended? In what ways did these experiences influence your faith?
- How is God real to you?
- Describe encounters with God (mystical, practical, in alone moments, through other people).
- What has been your experience with significant life events when your faith has been tested, strengthened, revealed)– uncertainty/doubt, divorce, death, loss, recovery from addictive behaviors.
- Consider the modeling and witness of others (the “Christ bearers” in your life). How have they influenced your faith?

APPENDIX 6: DISCERNMENT TEAM REFERENCE GUIDE

Contents

- A. Commonly Asked Questions About Discernment
- B. Forming a Discernment Team
- C. Discernment Team Meeting Structure
- D. Discernment Team Reference Guide Appendices
 - 6.1 - The Discernment Process Meeting Outline
 - 6.2 - The Discernment Process Report Guidance Document
 - 6.3 - Discernment Listening Guidelines
 - 6.4 - Asking Reflective Questions, Listening, and Observing
 - 6.5 - Lectio Divina

A. Commonly Asked Questions About Discernment

Q1: Isn't "discernment" just a religious term for "decision-making?"

A1: *No, they are different processes. Henri Nouwen described it this way "Christian discernment is not the same as decision making. Reaching a decision can be straightforward: we consider our goals and options; maybe we list the pros and cons of each possible choice; and then we choose the action that meets our goal most effectively. Discernment, on the other hand, is about listening and responding to that place within us where our deepest desires align with God's desire. As discerning people, we sift through our impulses, motives, and options to discover which ones lead us closer to divine love and compassion for ourselves and other people and which ones lead us further away."*¹

Q2: I've decided where I believe I'm being called, that's why I'm in this process. Why is a discernment team needed?

A2: *Episcopalians believe that the discernment of a call should not occur in isolation. It's essential to remain open to the guidance of the Holy Spirit throughout the process. A call must be affirmed by the wider community of believers. This is why discernment is required by the Canons of The Episcopal Church. Again, from Henri Nouwen, "While discernment begins in solitude, individual seekers of God always come together in community, for Spirit gathers all believers into one body for accountability and mutual support. A person honestly seeking to know God's will and way will choose to be in community"*²

Q3: My priest affirms my call, why do I need a team?

A3: *See above. The value of a team is to help you listen even more deeply. It is a gift. Ultimately, if your desire is to align with God's will, then having more people support you on the journey and hold you accountable is a good thing. Participating in a team will also help you learn about others and become more comfortable sharing your faith story.*

Q4: What if the team doesn't affirm my call to ordained ministry?

A4: *This can happen. But all are called to serve God and God's people in some ministry. The team can help you discover where God is calling you. A call to the ministry of the laity is vital to the life of the Church. Ultimately, if the goal is to know God's will, then a 'no' or 'not yet' is the kind of honest input you most need. These outcomes are not a value judgment on you or the depth of your spirituality. You are always a beloved child of God. You will thrive wherever your skills and abilities*

meet the deep needs of God's people. Your sponsoring priest and COM contact will discuss with you the licensed and other ministries to which you may be better suited at this time (Canon III.4.3-9).

Q5: How do I get started?

A5: *You've come to the right spot. The rest of this appendix contains the information you need. Your sponsoring priest and COM contact are also available to assist you. Let's get started!*

¹Henri Nouwen, *Discernment: Reading the Signs of Daily Life*, (HarperOne, 2013), xv

²Nouwen, *Discernment*, 13

B. Forming a Discernment Team

Your sponsoring priest and COM contact can help you identify potential discernment team members. Your team make-up should not be finalized until both your sponsoring priest and COM contact have signed off on the team membership.

Size: The recommended size for a discernment team is 4-6 people in addition to yourself. Of course, this may vary depending on your location. However, it's also becoming more common to conduct discernment team meetings online depending on tech skills, comfort level, frequency, etc.

Meeting time: Teams typically meet monthly or bi-weekly for 9 sessions spread over 6-9 months, for about 2 hours per meeting. This will vary depending on the team's availability and how well the team members know one another. It's critical that this time of discernment not be rushed or hurried. Time is also needed between meetings for continued deep listening and perhaps for discussions with loved ones who will also be impacted by the direction of your call.

There is no minimum or maximum time for a discernment process. You and the team will follow the direction of the Holy Spirit in deciding when discernment is complete. However, if COM believes the process has been rushed, they may ask you to form a new team or take additional actions.

Identifying team members: You will want to ask people who are open to God's movement in their own lives and who will ask deep, challenging questions. Team members will also be asked to share their own faith journey, personal experiences, and actively participate in group bible study and prayer. Teams work well when they include a diverse mix of people (age, gender, LGBTQ+, ethnicity, etc.). While most team members will likely be from your congregation, it is recommended to include people from outside your faith community who can speak to your ministry in the world. This may be someone from another Episcopal church, other faith traditions, community organizations, etc. While most members will not be ordained clergy, it can be helpful to have a clergy member(s) on the team (but not your sponsoring priest).

Other characteristics to consider are:

- People of prayer, humility, confidentiality, and openness to the working of the Holy Spirit within the Church and themselves.
- A mix of people who know you to varying degrees or not at all.
- People who have gifts of frankness and the courage to ask hard questions.
- People who have experience in the larger Church. This may include people familiar with the diocese and the wider Episcopal Church.
- Someone who may have experience in the type of ministry to which you are feeling called.

Note: It's not appropriate to include your spouse/partner/family member as a team member. However, it would be appropriate to include them in one (or more) of your meetings to discuss their support for your call. In fact, the team may request or suggest this. A family member could attend team meetings as long as the focus remains on your process and their presence doesn't impact the dynamics and openness of the conversation.

Confidentiality: Confidentiality is an important issue to consider when choosing team members. The team will need to have a conversation about confidentiality and make a covenant with one another about keeping the content of the discernment sessions confidential. Discernment is very personal. The topics discussed can and even should be very sensitive. The team needs to balance sensitivity with inquiry. It is unfair to accept a conversation at a level that does not ask you or the team to struggle. This struggle with and the expression of the deep sense of personal relationship with God and others is central to the practice of creative ministry.

While team discussions are confidential, you should keep your sponsoring priest periodically updated on how the discernment process is progressing. Also, you may wrestle with personal issues that would be appropriate to discuss with your sponsoring priest. This is your process so use your resources while still respecting the confidentiality of your team members.

C. Discernment Team Meeting Structure

Meeting structure: Typically, meetings follow a format like the following:

1. Check-in. A brief update so the group knows what's going on with each person (10-15 minutes)
2. Bible study using Lectio Divina (15-20 minutes)
3. Focus for the study session (see Discernment team process) 60 minutes
4. Reflection on the session. (15 minutes)
5. Closing prayers.
6. Logistics for the next session.

Team Orientation: The first meeting of the team will be the orientation session. Your COM contact and sponsoring priest must attend this meeting. This orientation session will last about 2 hours. A basic outline for the meeting is:

1. Welcome
2. Introductions
3. Introduction to Lectio Divina - Sponsoring Priest
4. COM Contact presentation – overview of ordination process, the role of the discernment team, confidentiality, etc.
5. Sponsoring Priest remarks
6. Questions
7. Logistics for next session.

For this first meeting provide:

- Online access to (or a paper copy) this discernment manual
- Information about any additional materials that members will need to access or purchase prior to the next meeting

Team Organization: In the orientation and/or the first working session, the team should decide on team structure and how members will work together. Roles could rotate through the team or remain with one person for the duration. The team will decide if it needs all or just some of the roles listed below. It is advisable to have a consistent facilitator (or co-facilitators) throughout the process.

- Convener (this may be your role)
 - Notify people of the sessions.
 - Make sure the meeting place is reserved.
 - Assign roles for each gathering.

- Facilitator (or co-facilitator)
 - Keep the session on track and schedule.
 - Make sure everyone has the opportunity to speak.
 - Observe the tone and spirit of the gathering.
 - Know when to take a break.
 - Worship Leader
 - Select prayers/devotional material for the session.
 - Lead prayers for the session.
 - Lead Bible study

- Recorder
 - Take the official notes of the session, if needed.
 - Prepare the final report with agreement from the team.

- Process Observer (this may also be part of the facilitator role)
 - Is aware of positive and negative dynamics in the group.
 - Call a break to discuss group dynamics, if necessary.
 - Observes the behaviors in the group and suggests changes, if necessary.

Team process: Appendix 6.1 outlines the recommended discernment process. If you would like to use a different process, please discuss this in advance with your sponsoring priest and your COM contact.

Knowing when to end: A consensus will generally emerge, and the group will sense when it is finished. There are several ways this may happen:

- You reach the clarity you are seeking.
- The team feels progress has stopped and it may be necessary to stop meeting or take an extended break.
- There seems to be an impasse due to personalities on the team.
- It is determined that you need to seek a different type of help.

There should be a consensus before proceeding to the next step. You and the team may discern:

- a clearer call to lay ministry.
- a call to pursue an ordained ministry.
- additional time in study and practice in a variety of ministries may be helpful.
- other issues in your life need to be resolved before proceeding.

The team, your sponsoring priest, COM contact, and spiritual director are resources to help you develop plans for what seems to be emerging.

Team Report: The team must provide a report to your Sponsoring Priest. Appendix 6.2 provides guidance for the report. Your sponsoring priest will share the report with your vestry and COM. It will also become part of your file at the bishop's office.

D. The Discernment Process Meeting Outline

Session 1: Orientation & Grounding

- Welcome, introductions, prayer
- Lectio Divina instruction. Possible Lectio reading: Eph. 4: 11-13 (model process)
- COM Orientation – process overview, set expectations
- Remarks by sponsoring cleric
- Address questions
- Team decides logistics for the next meeting, discusses any needed materials, etc.

Session 2: The Nature of Ministry

- Possible Lectio Divina scripture: Luke 22:24-27; 1 Samuel 1: 1-28
- Review the Discernment Team Report Guidelines (App. 6.2) to understand the expected outcomes of the discernment team's work.
- Inquirer presents their faith journey. Ask reflective, clarifying questions.
- Explore baptismal ministry, lay leadership, ordained ministries.
- Reading: BCP Catechism on Ministry, p. 855-856. Discuss differences.
- Begin sharing team member faith journeys. Note: During the discernment team process, each team member is encouraged to verbally share an overview of their faith journey. The team can determine if they want to spread this out over several sessions or combine them in a single or a few sessions.

Types of questions appropriate to consider in this session include:

- What is ministry?
- What is the ministry of each member of the discernment team?
- What are the current (and former) ministries of the inquirer?
- Who in your faith or general community has been an example of servanthood? What qualities do they exhibit?

Types of questions appropriate to ask if not addressed in the inquirer's faith journey narrative include:

- Describe the discernment process that led to your sense of call ordained ministry.
- Who is Christ in your life? How does Christ influence your daily life? How has being a Christian made a difference in your life? What do you do differently?
- Who has been an important role model(s) for you in the faith? Why? What have you learned from them that is relevant to your faith journey?
- How have you dealt with periods of spiritual dryness, crisis, or tedium?
- How do you listen for God? How do you discern what God wants of you? What conditions help you discern God's call? What gets in the way?
- What are you still questioning and searching about in your faith? How are you probing the mysteries of your faith?
- Is there anything in the faith journey to revise to better reflect key events or insights?

Session 3: Call and Vocation

- Possible Lectio Divina scripture: Romans 12: 1-21
- Inquirer shares sense of call. Group reflects with open-ended questions.
- Discuss distinctions between lay, diaconal, and priestly calls.

Types of questions appropriate to consider in this session include:

- Where do you find joy? When do you get so involved in something that you lose track of time? What is that like for you? What drains your energy? What do you avoid?
- Where do you see God in your life?
- How do you see yourself continuing to be engaged in this life-giving work moving forward?

Inquirer homework: Interview a priest, deacon, a lay professional, and a lay volunteer (preferably most closely aligned with the type of ministry you are interested in). Be prepared to discuss findings in Session 4.

The following are examples of questions the inquirer may want to ask the interviewees:

Clergy:

- Tell me about a few of your experiences of great learning and growth while preparing for ordination. Since ordination?
- What is the most difficult aspect of ordained ministry for you? For your household?
- What was the biggest surprise or Aha! for you in your vocation?
- What has the cost of ordination been for you and your household? What have you and your household sacrificed to respond to this vocational call?
- Describe the ministry of a deacon and/or priest as you understand it. What gifts and skills are necessary for the ministry of a deacon? For the ministry of a priest?
- What advice would you give me as I consider a possible call to ordained ministry?

Laity:

- Why did you choose your lay ministry as a vocation?
- Tell me about your call to lay ministry.
- What prepared you for your ministry e.g. education, experiences, mentors, etc.?
- What has been the biggest surprise or Aha! for you in your ministry?
- What do you see as the advantages/disadvantages of lay vs ordained ministry?

Session 4: Spiritual Life and Formation

- Possible Lectio Divina scripture: Mark 6: 30-31
- Inquirer shares learnings from interviews. Discuss.
- Reflect on prayer, scripture, sacraments, spiritual practices, including Rule of Life. Team members may share their experiences with spiritual practices including tips for staying consistent, how they deal with dry times/inconsistency, etc.
- Explore how the inquirer understands Christ and their relationship with God.

Types of questions appropriate to consider in this session include:

- What surprised you from the interviews? What gave you pause?
- What would you like to explore further from the interviews?
- What is your Rule of Life? How has your Rule of Life impacted your journey?
- Describe your spiritual practices including your prayer life. How have these practices affected your relationship with God over time? How has your prayer life changed over time?

Inquirer homework: Be prepared to address the questions in Session 5 regarding your present understanding of your call, strengths, weaknesses, and growing edges.

Session 5: Gifts, Strengths, and Growing Edges

- Possible Lectio Divina scripture: Galatians 5:22-26, Ephesians 4:15-16, Romans 12:18
- Inquirer: Given what you've learned about the various orders, your conversations with others and this team, how has your understanding of your call changed, grown, or become more focused over our time together?
- Inquirer reflects on strengths, weaknesses, growing edges.
- Group explores leadership, conflict, maturity, and adaptability.

Types of questions appropriate to consider in this session include:

- What are your "growing edges"? How are you working to address these?
- In what ways do you want to grow more spiritually? What skills would you like to develop further?
- What "pushes your buttons" or makes you angry? Describe time(s) when this occurred. What have you learned from these experiences that can help you be the person you want to be?
- Describe a time when you felt like a failure. Have you found grace in that experience? How do you extend that grace to others?
- Tell us about a time when you had a difficult relationship with someone.
- Are there signs that you seek ordination as a way of solving personal problems? Do you seek ordination as an external confirmation of authority or holiness?
- How do you care for yourself physically, emotionally, and spiritually?
- Describe an uncertain time through which you had to navigate? How was that for you?
- What have been your experiences with people who differ from you in race, class, health, sexual orientation, or gender?
- When do you feel called to serve? Whom do you feel you are not called to serve?

Session 6: Leadership, Authority, and Holiness

- Possible Lectio Divina scripture: Luke 22:24-27
- Examine leadership style, use of authority, and self-awareness.
- Reflect on bible passages that provide leadership examples, e.g. Numbers 11:16-17; 24-25 and Matthew 9:35-38.
- Reflect on holiness, humility, and community expectations.
- Explore how leadership in a church is different from leadership in other organizations, particularly working with volunteers, working with vestry as leadership team, parishioners feeling like "owners", etc.

Types of questions appropriate to consider in this session include:

- How did the Bible passages characterize leadership?
- Describe a time when you were in a leadership role with volunteers. What was that experience like for you? What was critical for success?
- What is your leadership role in your current parish? In former parishes? What is your leadership role in your current community? In former communities?
- Describe your relationship with people in authority. Describe a situation with a difficult supervisor. How did you deal with that?
- Describe a situation when you've been told to do something that challenges your values. How have you dealt with that?
- As you consider ordained ministry, how do you understand the power and authority that comes with that office?
- What is your approach when you are in a situation and feel powerless?

Session 7: Costs and Commitments of Ministry

- Possible Lectio Divina scripture: Luke 14: 28-33
- Explore family, financial, emotional, and vocational implications of ordination.
- Engage with questions of obedience, sacrifice, and resilience.
- Discuss how the discernment process has informed, shaped, or transformed the inquirer's sense of call.

Types of questions appropriate to consider in this session include:

- What does living a holy life look like? What does it mean to pattern your life and that of your family in accordance with the precepts of the gospel?
- What effect might your call have on household income during training, active ministry, and retirement? What are you doing to prepare for that?
- What stresses might the honoring of your ordination and/or baptismal vows and the public nature of the role bring to you and your household? How would you plan to address this?
- What will be the effects—positive and/or negative—of the inquirer's age for fulfilling their call?
- How do you understand stewardship of time, talent, and treasure?
- How do you understand personal financial responsibility, including tithing?
- How have you been faithful in giving time, talent, and treasure to the church? What challenges and blessings came from this?
- How has this discernment process informed, shaped, or transformed the inquirer's sense of call?

Session 8: Discernment Synthesis

- Possible Lectio Divina scripture: 1 Timothy 6: 11-19; James 1:5
- Team reflects without inquirer present, preparing written observations.
- Team completes discernment team report using App. 6.2 - Discernment Team Report Guidance document.

Session 9: Conclusion and Reporting

- Final meeting with the inquirer to share reflections. The team may decide to include a team dinner/celebration.
- Team sends the report to the sponsoring priest and the inquirer.

E. Discernment Team Report Guidelines

These guidelines outline topics to address in the discernment team's final report. The report may be organized as the team chooses, as long as each topic is addressed. Strive to provide balanced, specific, and descriptive feedback, including both strengths and areas for development, supported by examples from your experience of the discernment process. It's important that team members agree with the content of the report and that differing opinions are noted. **The final report must be dated and signed by each discernment team member, indicating agreement with its content.** There is no separate signature form. The report must be included in the Discernment Packet ([see step 12, page 13](#)).

- **Team process and Structure.** Describe the discernment process (Canon III.8.2.b.5), including:
 - Team members, their relationship to the inquirer, their role in the team, etc.
 - The number and scheduling of team meetings
 - How meetings were structured, how Bible Study & prayer was incorporated, etc.
 - What resources were used
 - Anything else that would be helpful in understanding how the team functioned.

- **Inquirer's gifts for ministry.** Reflect on how the inquirer's gifts may be best utilized within the Church. Does the team discern a call to continued lay ministry or to ordained ministry (diaconate or priesthood)? If to ordained ministry, how would ordination enable the inquirer to serve God more fully? Does the inquirer understand the ordained role as one of organizing & equipping others vs. acting independently? How is the inquirer already, or not yet, exercising the ministry of a deacon or priest? Can you envision the inquirer serving as your priest or deacon?
- **Exercise of gifts.** Describe how the inquirer is currently living into their sense of call. What gifts & skills are they already demonstrating? What skills need to be further developed? Cite examples of leadership, initiative, or ministry involvement, and note both strong points and areas for growth/exploration.
- **Spiritual and Personal Characteristics.** Provide descriptive evidence—specific examples from your discussions or observations—that illustrate these characteristics.
 - Identify the inquirer's spiritual strengths (gifts for ministry).
 - Identify characteristics that may inhibit the inquirer's pursuit of ordained ministry. How does the inquirer interact with authority – people, rules, etc.? Did you encounter any issues of power, authority, obedience, and accountability that may be present for the inquirer as the possibility of ordained ministry is considered?
 - Are there signs that the inquirer seeks ordination as a way of solving personal problems?
 - Does inquirer have a level of maturity and adaptability appropriate for their age and stage of life?
 - How does the team assess the inquirer's effectiveness in interpersonal relationships – pastorally, individually, in groups? When dealing with feelings or difficult subjects, does their body language match their words?
- **Academic Readiness.** Provide evidence of the inquirer's ability to pursue graduate-level theological studies (e.g., critical thinking, persistence, study habits, discipline, online literacy). Do they present (oral & written) information clearly? Are they curious? Describe specific strengths and concerns, supporting your comments with observed examples from the discernment process.
- **Personal Impacts and Relationships.** Describe the personal impacts of the inquirer's pursuit of their call, including effects on close relationships, finances, employment, health, self-care, and time commitments. Offer examples and note how the inquirer has considered or addressed these impacts. Highlight both positive adaptations and areas that may require further attention.
- **Growth During the Process.** Summarize the inquirer's growth throughout discernment. Identify any challenges faced, how these were addressed, and what issues may need continued work. Use specific examples to illustrate progress and ongoing areas for development.

Additional Information. The discernment team should also keep the following attributes and dispositions of the inquirer in mind throughout the process. These attributes will be revealed in a variety of ways in conversations rather than by asking direct questions about them. Please support your comments with specific examples.

- Personal integrity and self-esteem
- Ability to motivate others
- Demonstration of initiative, self-confidence, enthusiasm
- Adaptability – to different leadership styles, to interacting with diverse populations, navigating uncertainty
- Physical health and energy
- Sense of own strengths and limitations

Discernment team report for Section 3 & Section 4 ordained clergy. In addition to the items listed above, discernment team reports for clergy seeking to be received as priests in TEC should also address the following:

- The team’s understanding of why the discerner is seeking reception in TEC instead of another denomination or remaining in their former denomination.
- Any areas the discerner could further develop to integrate more fully into the Episcopal tradition, beliefs, and practices.

F. Discernment Listening Guidelines

Adapted from Listening Hearts, Morehouse Publishing: 1991

- Take time to become settled in God’s presence.
- Listen to others with your entire self (senses, feelings, intuition, imagination, and rational faculties).
- Do not interrupt.
- Pause between speakers to absorb what has been said.
- Do not formulate what you want to say while someone else is speaking
- Speak for yourself only, expressing your own thoughts and feelings, referring to your own experiences. Avoid being hypothetical. Steer away from broad generalizations.
- Do not challenge what others say.
- Listen to the group as a whole – to those who have not spoken aloud as well as to those who have.
- Generally, leave space for anyone who may want to speak a first time before speaking a second time yourself.
- Hold your desires and opinions – even your convictions – lightly.

G. Asking Reflective Questions, Listening, and Observing

Reflective questions provide the opening for deeper conversation. Asking reflective questions is a technique that the team can develop. This type of reflective dialogue also requires listening in a way to draw conclusions from examples.

- What did you learn about yourself through that experience?
- What are you feeling now as you tell that story?
- Why was that difficult for you?
- Where do you now see God at work in that situation? How does that change how you view that situation?
- I wonder what you think could have been handled differently?
- Did that activity energize you or drain you? What might that be suggesting about your gifts?
- Why is that meaningful for you?

H. Lectio Divina Description

Lectio Divina is “divine reading”. It can be done in community or in private. It is called by different names. Some call it the African prayer method, but it is basically the same. Below is a way that Lectio Divina can be practiced in a group setting.

- One person reads a short reading of scripture, poetry or prose through one time. Allow for a short time of silent reflection for the group to consider the reading.
- The same passage is read a second time by the same person, or you may choose to hear a different voice. This time the group is invited to listen for a word or phrase that “speaks” to them. Following the reading allow for another short silence. Invite group members to share the word or phrase that spoke to them. This is not a time for discussion, just a sharing of the word or phrase.
- The same passage is read a third time listening for something that may be unique to the needs of the individual or group. If an individual is using the practice to pray, they may hear something in the reading that God is using to speak to them as an individual. If a group such as a discernment team is employing Lectio Divina, they may be using this third reading to listen for what God may be saying to the group. Some may want to share this “finding”, but some may want to keep it to themselves. Either path is okay.
- Option: End with a final reading of the passage and some silent reflection.

APPENDIX 7: ACTION CHART

Identifies Responsibility for Initiating and Performing Action for Each Process Step

I = Responsible for Initiating the Step







X = Performs an Action Within the Step

Phase/Step	Person in Process	Rector/ Sponsoring Priest	Bishop/ Bishop's Assistant	COM	Vestry	Discernment Team	Standing Committee
INQ1	I			X			
INQ2	I	X					
INQ3	X	I		X			
INQ4	I						
INQ5	I	X					
INQ6	I	X					
INQ7		I	X	X			
INQ8			X	I			
INQ9	I		X				
INQ10	X	I		X	X		
INQ11	X	I		X		X	
INQ12	I		X	X			
INQ13		I			X		
INQ14	I				X		
INQ15			X	X			
INQ16	X						
INQ17			X	I			
NOM18	I		X				
NOM19	I	X	X	X			
NOM20	I		X				
NOM21	X			I			
NOM22			X	I			

Phase/Step	Person in Process	Rector/ Sponsoring Priest	Bishop/ Bishop's Assistant	COM	Vestry	Discernment Team	Standing Committee
NOM23	X		I	X			
POST24	X	X	I	I			
POST25	I						
POST26	I		X				
POST27	I						
POST28	I		X	X			
POST29	I						
POST30	I	X	X	X	X		
POST31				I			X
POST32	X						I
POST33	X		I	X			
CAND34(P)	I		X	X			
CAND34(D)	X			I			
CAND35				I			
CAND36	I	X	X	X	X		
CAND37			X	I			X
CAND38			X				I
CAND39	X	X	I				
TD40	I	X	X	X	X		
TD41			X	I			X
TD42	X		X				I
TD43	I		X				

APPENDIX 8: FORMS FOR ORDINATION PROCESS

Form	Link + QR Code
Form 1 - Personal Information Form	forms.greatlakesepiscopal.org/com-form-1 
Form 2 - Nomination for Ordination	forms.greatlakesepiscopal.org/com-form-2 
Form 3 - Financial Assessment and Planning Guide for Nominees	forms.greatlakesepiscopal.org/com-form-3 
Form 4 - Application for Candidacy	forms.greatlakesepiscopal.org/com-form-4 
Form 5 - Certification for Candidacy	forms.greatlakesepiscopal.org/com-form-5 
Form 6 - Ordination to the Diaconate	forms.greatlakesepiscopal.org/com-form-6 

Form	Link + QR Code
Form 7 - Certificate for Ordination to the Diaconate	forms.greatlakesepiscopal.org/com-form-7 
Form 8 - Testimonial for Ordination to the Diaconate	forms.greatlakesepiscopal.org/com-form-8 
Form 9 - Testimonial for Ordination to the Diaconate (Transitional)	forms.greatlakesepiscopal.org/com-form-9 
Form 10 - Application for Ordination to the Priesthood	forms.greatlakesepiscopal.org/com-form-10 
Form 11 - Certificate for Ordination to the Priesthood	forms.greatlakesepiscopal.org/com-form-11 
Form 12 - Testimonial for Ordination for the Priesthood	forms.greatlakesepiscopal.org/com-form-12 

APPENDIX 9: CLERGY SEEKING RECEPTION IN THE EPISCOPAL CHURCH

Introduction

There are three distinct processes (listed below) for clergy seeking reception into The Episcopal Church. The bishop will determine which of these processes is applicable in each situation. If there is no bishop, the COM chair or COM Staff Liaison will contact the Presiding Bishop's office for guidance. The following information will be needed 1) the person's full name, 2) the tradition in which they were ordained, 3) the name of the ordaining officiant. This is part of the process for confirming the regularity of ordination. (Canon 1.16.3)

- III.10.2 ("Section 2") - Clergy Ordained by Bishops of Churches in Communion with This Church. (e.g., the ELCA, the Moravian Church, and the Old Catholic Churches)
- III.10.3 ("Section 3") - Clergy Ordained in Churches in Historic Succession but Not in Full Communion with This Church. (e.g., the Roman Catholic Church and the Eastern Orthodox Church)
- III.10.4 ("Section 4") - Clergy Ordained in Churches Not in the Historic Succession. Note: Deacons and licensed ministers from these traditions would not follow this process but would be subject to Canon III.6 (Deacon) or Canon III.8 (Priest) depending on their call.

This process for clergy reception and related forms is an appendix to the Episcopal Diocese of the Great Lakes (EDGL) Manual for Ordination (OM). While the specific steps and some forms may vary from the ordination process, much of the terminology, philosophy, processes (background checks, psychological evaluations, discernment process, etc.), are the same. Therefore, you may find some of the Appendices in the OM helpful. For example, Appendix 1 is a glossary of terms. In some places the reception process will refer you to a specific step in the OM for more detailed information.

When in doubt, refer to the relevant Canon(s) and the OM when additional guidance is needed. Your priest and the Commission on Ministry (COM) are also available to assist you. As stated in the OM, you are responsible for your process; others will assist you, but you must see that the various steps of your process are completed.

The following steps are intended to conform to the Canons of The Episcopal Church (TEC). Where there is any inconsistency, the Canons prevail. Depending on your circumstances, some steps may occur simultaneously or in a slightly different order. Agree on variations in advance with both your sponsoring priest and COM contact.

Canon III.10.2 "Section 2" - Clergy Ordained by Bishops of Churches in Communion With This Church

- S2-1.** Discuss your desire for reception with your rector or priest-in-charge, who, if supportive of this call, will likely become your sponsoring priest. In the absence of ordained clergy, contact the Bishop. In the absence of a bishop contact the COM chair for assistance in identifying a sponsoring priest.

Date Completed: _____

Note: A deacon shall not be ordered priest until having resided within the jurisdiction of this church at least one year and all requirements for ordination and all the requirements for ordination to the Priesthood, Canon III.(8) have been satisfied (See Ordination Manual for details). (III.10.2.b)

- S2-2.** The sponsoring priest notifies the bishop (cc to COM chair). If the bishop agrees, the Bishop's assistant will arrange a meeting between you and the bishop.

Meeting Date: _____

- S2-3.** Complete the Personal Information Form (Step 5, Form 1, OM) and send to the bishop's assistant.

Date Completed: _____

- S2-4.** The bishop will contact your most recent former bishop (or clerical supervisor, in the case of a denomination without a bishop) from the denomination in which you were ordained. If this is not possible due to personal circumstances, death, etc., the bishop will determine if you continue in this process.

- S2-5.** Obtain Letters Dimissory or equivalent under the hand and seal of the Bishop from the diocese with whom you were last connected. (III.10.2.a.2).

Date Completed: _____

- S2-6.** Contact the bishop's assistant to initiate the following processes (III.10.1.a-b). You will need to provide your SSN and a copy of the front and back of your driver's license. If preferred, this may be done in person by making an appointment. This personal data will be kept in a locked safe separate from the personnel file.

- a. Background check. Obtain release-of-information form to sign and return. The bishop's assistant will arrange for the background check (at the diocese's expense). The bishop's assistant will inform you and COM when the background check has been completed, and the results have been placed in your file.

Date Completed: _____

- b. Medical Evaluation form. You will bear the expense of this exam. Send the completed form to the bishop's assistant and inform your COM contact. Even if the completed form is being sent by the medical provider, it is your responsibility to ensure that the form is received by the bishop's assistant.

Date Completed: _____

- c. Credit check. Obtain authorization form to sign and return. The diocese will bear the expense for this.

Date Completed: _____

- d. The bishop's assistant will initiate the psychological evaluation when requested by COM. You will then be contacted by the service provider to schedule the evaluation. The cost for this may be shared with the diocese.

Date Contacted: _____

Evaluation Date: _____

- S2-7.** Submit evidence of the following completed training (III.10.1.c) via Reception S2 Training Packet Submission Portal available via the QR code below and at forms.greatlakesepiscopal.org/com-reception-s2-packet



- a. prevention of sexual misconduct
- b. civil requirements for reporting and pastoral opportunities for responding to evidence of abuse
- c. the Constitution and Canons of The Episcopal Church, particularly Title IV thereof.
- d. training regarding the Church's teaching on dismantling racism and achieving racial justice and healing.
- e. Completion of a unit of Clinical Pastoral education or equivalent (if proof of prior completion is not provided)
- f. LGBTQ+ Cultural Competency training.

Date Completed: _____

- S2-8.** You will be assigned to a mentor Priest by the Bishop in consultation with COM (III.10.1.e). The mentor will meet regularly with you to provide an opportunity for guidance, information, and a sustained dialogue about ministry in the Episcopal Church. It is also recommended that you have an active commitment to continuing spiritual direction.

Date Completed: _____

- S2-9.** The Bishop and at least one Priest shall examine you as to your knowledge of the history of this Church, its worship and government.

Date Completed: _____

- S2-10.** The Bishop being satisfied with your theological qualifications, may then receive you into the Diocese as a Member of the Clergy of this Church. The bishop will require a promise in writing that you will submit to Church discipline (III.10.2.a.2) and will require you to make a declaration required in Article VIII of the Constitution in the presence of the bishop and two or more presbyters (III.10.2.a.2):

“I do believe the Holy Scriptures of the Old and New Testaments to be the Word of God, and to contain all things necessary to salvation; and I do solemnly engage to conform to the Doctrine, Discipline, and Worship of The Episcopal Church.”

- S2-11.** The bishop arranges for you to be received as a priest in The Episcopal Church.
- S2-12.** Following reception, you shall be assigned a mentor priest by the bishop in consultation with the COM. You shall meet regularly to provide guidance, information, and sustained dialogue about ministry in TEC.

Canon III.10.3 - "Section 3" Clergy Ordained by Bishops in Churches in the Historic Succession But Not in Full Communion With This Church

- S3-1.** You must be received as a lay confirmed communicant in TEC. No further action will be taken in this process until this step is completed. You must be a confirmed lay communicant at least 12 months before you can be received as a priest.

Date Completed: _____

- S3-2.** Discuss your desire for reception with your rector or priest-in-charge, who, if supportive of this call, will likely become your sponsoring priest. In the absence of a priest, contact the COM chair for assistance in identifying a sponsoring priest.

Date Completed: _____

- S3-3.** The sponsoring priest notifies the bishop (cc to COM chair). If in agreement, the bishop will inform COM to proceed with the process. COM will assign a member to work with you ("COM contact") throughout the process.

Date Completed: _____

- S3-4.** Complete the Personal Information Form ([Form 1](#), [Step 5 in OM](#)).

Date Completed: _____

- S3-5.** The bishop will contact your most recent former bishop (or clerical supervisor, in the case of a denomination without a bishop) from the denomination in which you were ordained. If this is not possible due to personal circumstances, death, etc., the bishop will determine if you continue in this process.

- S3-6.** COM will arrange, through the bishop's assistant, for you to obtain the lay Preaching and Worship Leader licensing so you can begin serving in this capacity. Your sponsoring priest may want to provide some direction or supervision of these processes. Your sponsoring priest may also require participation in the formal Lay Preaching and/or Lay Worship Leader classes as part of your on-going preparation for reception.

Date Notified: _____

Note: Even if the formal training requirement is waived, you will still need to complete the prerequisite evaluations/training such as receiving a satisfactory background check, completing training such as Safe Church, Becoming Beloved Community: Dismantling our Divisions, etc.

- S3-7.** The COM may request an introductory meeting with you.

Date for Meeting: _____

- ❑ **S3-8.** The bishop, your COM contact, and sponsoring priest will work with you to develop & monitor an individualized program of preparation and ensure pastoral guidance is provided through the period of preparation. Appendix 9-1 is an Anglican Studies reading list. Your sponsoring priest, COM, or bishop may require some of these books or additional books/ courses as part of your preparation process. You are also expected to be engaged with a Spiritual Director (App. 4, OM).

- ❑ a. A formal Anglican Studies course is required. This may be obtained through the Academy for Vocational Leadership or other institution as agreed to by your sponsoring priest, the bishop, and COM. You will be required to submit a paper addressing the questions such as:

- i. What did you learn?
- ii. How is that different from your experience prior to being a part of TEC?
- iii. How would you teach this information in an Episcopal setting?

Date Enrolled: _____

- ❑ b. Community Organizing training may be required.

Date Completed: _____

- ❑ **S3-9.** In consultation with your Sponsoring Priest and COM contact, initiate the Discernment Team process (Step 11, OM). Rather than a typical focus on a call to the ministry, your discernment team will focus on your call to ministry in the Episcopal Church. Writing a Faith Journey is part of the discernment process (Step 6, Appendix 5, OM). Your Faith Journey should include a discussion of your decisions for choosing your previous denomination(s), reasons for leaving, reasons for seeking reception specifically in TEC at this time, etc. and the discernment processes you undertook that led to these decisions.

In addition to, or in the place of, the interviews included in the discernment process, your Sponsoring Priest and COM may ask you to complete additional assignments such as interviewing other clergy who have been received into TEC and reflect on those experiences.

In addition to the items listed in the discernment team report guidance document, your team report should also address

- Their understanding of why you are seeking reception in TEC instead of another denomination or remaining in your former denomination.
- Any areas you could further develop to integrate more fully into the Episcopal tradition, beliefs, and practices.

Date Completed: _____

- S3-10.** At the conclusion of your discernment process, submit a Discernment Packet to be sent to your sponsoring priest, COM contact, and the bishop’s assistant. All required documents should be sent via the S3 Discernment Packet Submission Portal available at forms.greatlakesepiscopal.org/com-s3-discernment-packet and via the QR code below. This packet must include the following:



- a. The discernment team report,
- b. An updated Faith Journey narrative incorporating discernment team feedback, and
- c. A “Discernment reflection” explaining your key learnings from the discernment process (no more than 2 pages). Questions to consider may include how the experience of team discernment was for you? Did your experience of the process change over time? What surprised you? With what are you continuing to wrestle? What changes have/will you make based on your discernment team experience?

Date Completed: _____

- S3-11.** Meet with the vestry. Your sponsoring priest/rector will provide the discernment packet to the vestry and schedule a vestry meeting to discuss your completed discernment materials. You may be asked to participate in this discussion. After reviewing the materials, the vestry will determine if they agree to nominate and support you to continue in the reception process. If so, they must complete the Nomination for Reception Form per III.10.3.a.1 (FORM 9-1) and send it to you. 13

Date Received: _____

- S3-12.** Reply to the vestry in writing accepting their nomination (III.10.3.a.2).

Date Completed: _____

- S3-13.** Work with your COM contact to arrange for a COM interview.

Interview Date: _____

- S3-14.** Apply for reception in writing to the bishop’s office (III.10.3.a.2). The application should include the following information. Submit this information via the S3 Application Packet Submission Portal available at the QR code below and at forms.greatlakesepiscopal.org/com-s3-application-packet



- a. Full name and date of birth.
- b. The Nomination for Reception from your congregation in this Church. This includes a letter of support committing the community to involve itself in your preparation for Reception, signed by 2/3 of the vestry and the priest (Form 9.1)

- c. Your acceptance of the Nomination for Reception.
- d. The length of time resident in the diocese.
- e. Evidence that you are a confirmed adult communicant in good standing in a congregation of this Church.
- f. Whether an application has been made previously for reception in any diocese. If so, explain.
- g. A description of the process of discernment you have undertaken individually and with the nominating congregation or community of faith (Attaching the discernment report will meet this requirement).
- h. A statement of reasons for seeking to enter Holy Orders in this Church.
- i. Evidence of previous ordained ministry and that all other credentials are valid and authentic.
- j. Evidence of moral and godly character and that you are free from any vows or other engagements inconsistent with the exercise of Holy Orders in this Church. Note: This can be satisfied by including the following statement in your cover letter: "I am free from any vows or other engagements inconsistent with the exercise of Holy Orders in The Episcopal Church. I know of no practice, habit, or manner of my life that precludes me from being able to serve faithfully as a priest in this ministry."
- k. Transcripts of all academic and theological studies to date, including evidence of satisfactory theological training in the previous Church.
- l. A certificate from at least two presbyters in good standing of this Church stating that, from personal examination or from satisfactory evidence present to them, they believe that your departure from the Communion to which you previously belonged has not arisen from any circumstance unfavorable to moral or religious character, or on account of which it may not be expedient to admit you to Holy Orders in this Church.

Date Completed: _____

- S3-15.** The bishop will inform you and COM of the decision regarding process continuation.

Date Notified: _____

Nominee through candidacy process

- S3-16.** You must communicate with the bishop in person or by letter, four times a year, in the Ember Weeks ([Step 26, OM](#)).
- S3-17.** Contact the bishop’s assistant to initiate the following processes. You will need to provide your SSN and a copy of the front and back of your driver’s license. If preferred, this may be done in person by making an appointment. This personal data will be kept in a locked safe separate from the personnel file.

- a. Background check release-of-information form to sign and return. The bishop’s assistant will arrange for the background check (at the diocese’s expense). The bishop’s assistant will inform you and COM when the background check has been completed, and the results have been placed in your file.

Date Completed: _____

- b. Medical Evaluation form. You will bear the expense of this exam. Send the completed form to the bishop’s assistant and inform your COM contact. Even if the completed form is being sent by the medical provider, it is your responsibility to ensure that the form is received by the bishop’s assistant.

Date Completed: _____

- c. Credit check authorization form to sign and return. The diocese will bear the expense for this.

Date Completed: _____

- d. The bishop’s assistant will initiate the psychological evaluation when requested by COM. You will then be contacted by the service provider to schedule the evaluation. The cost for this may be shared with the diocese.

Date Contacted by Provider: _____

Evaluation Date: _____

- S3-18.** Complete training listed below which is available through the diocese. Training records are not automatically flagged for your file. This documentation should be sent via the S3 Training Packet Submission Portal which is available at forms.greatlakesepiscopal.org/com-s3-training-packet or by scanning the QR code below.

Date Completed: _____



- a. The Constitution and Canons of The Episcopal Church, particularly Title IV thereof, utilizing but not limited to the use of, the Title IV training website of The Episcopal Church. (III.10.1.c.3).

Date Completed: _____

- b. Becoming Beloved Community: Dismantling our Divisions (III.10.1.c.4).

Date Completed: _____

- c. Safe Church (Children & vulnerable adults), including civil requirements for reporting and pastoral opportunities for responding to evidence of abuse (III.10.1.c.1-2).

Date Completed: _____

- d. LGBTQ+ Cultural Competency training.

Date Completed: _____

- e. Community Organizing training (if required).

Date Completed: _____

- f. At least one unit of Clinical Pastoral education (if proof of prior completion is not provided.)

Date Completed: _____

- S3-19.** After the evaluations have been completed and the training records are sent, contact the bishop's assistant to set up a meeting with the bishop. If the bishop supports your continuation in the reception process, a mentor priest will be assigned. This may be your sponsoring priest or another priest. The bishop and mentor priest will meet regularly with you to provide an opportunity for guidance, information, and a sustained dialogue about ministry in The Episcopal Church.

Meeting Date(s): _____

- S3-20.** Provide, to the bishop's assistant and your COM contact, documentation indicating that you have successfully completed the Anglican Studies course.

Date Completed: _____

- S3-21.** COM requires that you provide a reflection paper(s) describing:
 - a. Areas of tension between your former tradition and tradition/ethos of The Episcopal Church. How do you plan to live in that tension and what you will do when those tensions arise in practical ways in a parish?
 - b. Your plan to continue becoming even more enmeshed in Anglican conversations/ethos after reception.

Date Completed: _____

- S3-22.** Update your transcripts, as appropriate, to reflect the courses completed during your preparation process.

Date Completed: _____

- ❑ **S3-23.** The bishop, COM, and your sponsoring priest will determine when your period of initial preparation has ended. Additional preparation may be required based on a review of potential gaps.
- ❑ **S3-24.** The COM will be responsible for assessing your proficiency in the following subjects: (Canon III 10.3.c.1-4)
 - Church History: the history of the Anglican Communion and TEC.
 - Doctrine: the church's teaching as set forth in the Creeds, and in An Outline of the Faith, commonly called the Catechism.
 - Liturgics: the principles and history of Anglican worship: the contents of the BCP.
 - Practical Theology
 - The office and work of a Deacon and Priest in this Church.
 - The conduct of public worship.
 - The Constitution and Canons of The General Convention, and of the diocese in which the applicant is resident. (particularly Title IV).
 - The use of voice in reading and speaking.
 - Points of Doctrine, Discipline, Polity, and Worship which are different from this Church will be examined in part by written questions and answers. This will be kept on file for at least 3 years.
 - The significance of the sacraments as well as the sacramental nature of Ordination

This examination will likely be accomplished through a local examining board. The examining board will provide a report to COM, identifying areas where remediation is needed. COM will notify you of the results. The bishop, COM and the Sponsoring priest will determine the process of remediation, as needed. Typically, COM and the Sponsoring priest will notify the bishop when proficiency is established. You will be notified when the bishop approves of your continuation in this process.

Exam Date: _____

- ❑ **S3-25.** Per Canon III.10.3(e) you shall obtain certificates from the bishop and the Standing Committee ([Testimonial for Reception into Priesthood, Form 9.2](#)) that you are an acceptable member of the clergy of this Church, subject to the successful completion of the examination. The Standing Committee will have access to your file as needed and may also request an interview. The Standing Committee may also request that the vestry complete a Certificate for Reception into the Priesthood ([Form 9.3](#)).

Date Completed: _____

- S3-26.** You will receive notification from the bishop that, with the advice and consent of the Standing Committee, the requirements have been met to be received as a Member of the Clergy of this Church.

Date Completed: _____

- S3-27.** The bishop must receive approval from the Presiding Bishop's office regarding the regularity of ordination (Canon 1.16.3). In order to receive this approval the Presiding Bishop's office must be satisfied generally that there is nothing irregular in your path to ordination in The Episcopal Church. This requires that there has been conversation between you and the bishop about the following:
- Why you chose to be ordained in your former denomination, and/or chose never to be part of The Episcopal Church, and to understand your history – and present relationship – with the other denomination.
 - To understand clearly why you, at this time, wish to come into (or return to) The Episcopal Church.
 - To confirm your knowledge/understanding of Episcopal Church polity.
 - To determine the nature of your commitment to The Episcopal Church.

RECEPTION

- S3-28.** The bishop will require a promise in writing that you will submit to Church discipline and will require you to make a declaration required in Article VIII of the Constitution in the presence of the bishop and two or more presbyters:

“I do believe the Holy Scriptures of the Old and New Testaments to be the Word of God, and to contain all things necessary to salvation; and I do solemnly engage to conform to the Doctrine, Discipline, and Worship of The Episcopal Church.”

Date Completed: _____

- S3-29.** The bishop, with advice and consent of the Standing Committee, receives you into the Church as an ordained minister.

Date Received: _____

- S3-30.** Following reception, you shall be assigned a mentor priest by the bishop in consultation with the COM. You shall meet regularly to provide guidance, information, and sustained dialogue about ministry in TEC.

Canon III.10.4 "Section 4" - Clergy Ordained in Churches Not in the Historic Succession

If you are subject to Canon III.10.4 you must follow the procedures and requirements set forth in Canon III.6 (for diaconate) or III.8 (for priest) per III.10.4.a. These are the same ordination processes outlined in the EDGL Ordination Manual.

- ❑ **S4 -1.** You must be received as a lay confirmed communicant in TEC. No further action will be taken in this process until this step is completed. You must be a confirmed lay communicant at least 12 months before you can be received as a priest.

Date Completed: _____

- ❑ **S4-2.** After the Inquirer Packet has been sent to the bishop's assistant and COM ([Step 8, OM](#)), contact the bishop's assistant to arrange for an introductory meeting with COM (III.10.4.b). During this meeting COM will explore

1. Whether you have served in your previous Church with diligence and good reputation and have stated the reasons for deciding to leave your former denomination and seek ordination in TEC. This should also be addressed in your Faith Journey narrative and should have been explored with your discernment team.
2. The nature and extent of your education and theological training.
3. The preparations necessary for ordination to the Order to which you feel called.

COM will report their findings to the bishop. You will be notified regarding your continued participation in the ordination process. If the bishop and COM agree that further discernment toward a call to ordained ministry is appropriate at this time, the ordination process will continue as outlined in the Ordination Manual.

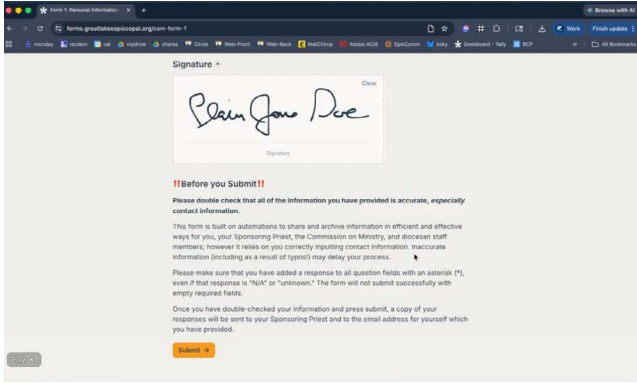
Forms for Clergy Reception Process

Form	Link + QR Code
Form 9.1 - Nomination for Reception as a Priest	<p data-bbox="786 306 1312 338">forms.greatlakesepiscopal.org/com-form-9-1</p> 
Form 9.2 - Testimonial for Reception to the Priesthood - Canon III.10.3	<p data-bbox="786 583 1312 615">forms.greatlakesepiscopal.org/com-form-9-2</p> 
Form 9.3 - Certificate for Reception into the Priesthood - Canon III.10.3	<p data-bbox="786 861 1312 892">forms.greatlakesepiscopal.org/com-form-9-3</p> 

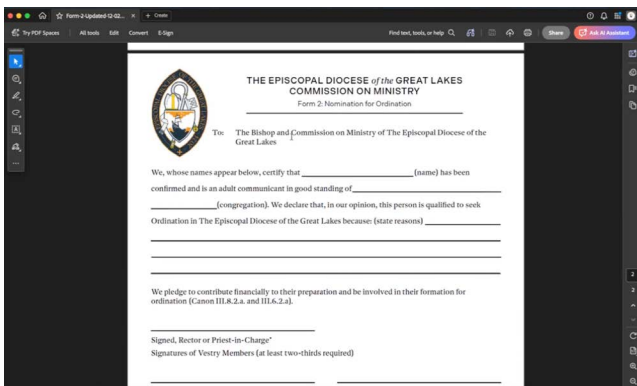
HOW TO GUIDES

These videos show you how to use the online forms and submission portals that are part of this process and they cover the most basic and common functions. However, if you encounter a problem and need technical support, please reach out to the Director for Communication at info@greatlakesepiscopal.org. For process (non-technical) questions, reach out to com@greatlakesepiscopal.org. Click the video stills or scan the QR codes to watch the videos.

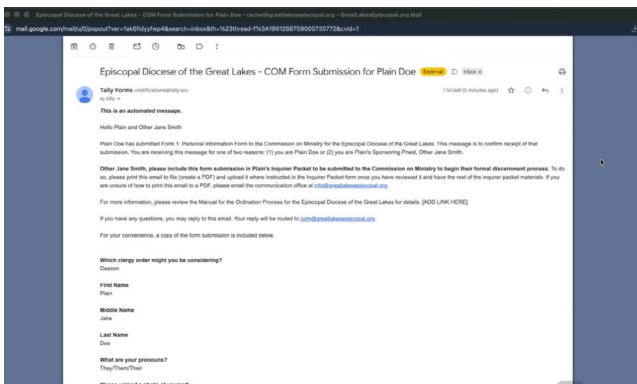
How to Submit a Form in the Ordination Process



How to Submit a Form which Requires Multiple Signatures in the Ordination Process/How to upload a file in a form in the Ordination Process



How to Save your Form Submissions in the Ordination Process



CHANGE LOG

Please note that when updates to the Ordination Manual are released, all people who are already engaged in the proces must switch to the most recent version of the manual to guide the remainder of their path. The diocese as a whole will be alerted to an updated version when it is released. It is the responsibility of a person in proces to stay tuned in to diocesan communications and, when a new version of this manual is released, to intiate discussions with their COM Contact and Sponsoring Priest to understand how they and their proces are impacted (or not) by the changes.

Version 1: **January 2026**

Version 1.1: **April 2026**

Add online form links and update instructions regarding form and packet submissions.

Add how-to videos.

Clarify - no separate signature page for Discernment Team Report

No changes to proces steps.