

CHECKLIST ~ Stage 1: Inquirer

Please follow this checklist in stepwise order. Should you need clarification of any steps, please refer back to the instructions for **Stage 1** that are provided on pp. 3 - 5.

Completed		Target Date
	A. <u>Getting Started</u>	
<input type="checkbox"/>	1. <u>Congregational Participation and Residence</u>	_____
<input type="checkbox"/>	2. <u>Meetings with Your Congregation’s Clergy-in-Charge</u>	_____
<input type="checkbox"/>	3. <u>Listening Hearts Conversation (optional)</u>	_____
<input type="checkbox"/>	4. <u>Commission on Ministry (COM) Day of Information</u>	_____
	B. <u>Following Through to Nomination</u>	
	1. <u>Submission of Initial Application Materials – JANUARY 15</u>	
<input type="checkbox"/>	• Spiritual Autobiography	_____
<input type="checkbox"/>	• Biographical Information (Form 1 , <i>Discernment for Ordination Application and Social History</i>)	_____
<input type="checkbox"/>	• Letter of Recommendation from Sponsoring Clergy Member	_____
<input type="checkbox"/>	• <u>Begin the work of locating baptismal and confirmation (or reception) records, and post-secondary education transcripts, all of which will be due October 31</u>	_____
	2. <u>Parish Discernment Committee (PDC) – COMPLETED BY JULY 15</u> <i>After</i> having submitted all three of the application materials listed above at B.1, you may proceed with the following:	
<input type="checkbox"/>	• Contact the Discernment-Conversations Coordinator to request the initiation of your Parish Discernment Committee.	_____
<input type="checkbox"/>	• Participate in PDC meetings.	_____
<input type="checkbox"/>	• The PDC submits a report to your sponsoring clergy and to the vestry/bishop’s committee.	_____
<input type="checkbox"/>	3. <u>Vestry Nomination – COMPLETED BY JULY 31</u> After an affirmative vote, the vestry/bishop’s committee submits the Letter of Nomination (Form 8) to the bishop’s executive assistant.	_____
<input type="checkbox"/>	4. <u>Interview with the Commission on Ministry – AUGUST COM MEETING</u>	_____
<input type="checkbox"/>	5. <u>Notification from the Bishop</u> of decision regarding your advancement.	_____
<input type="checkbox"/>	6. <u>Your Formal Acceptance of Nominee Status – ASAP AFTER VESTRY NOMINATION</u>	_____

CHECKLIST ~ Stage 2: Nominee

Please follow this checklist in stepwise order. Should you need clarification of any steps, please refer back to the instructions for **Stage 2** that are provided on pp. 8-11.

Completed		Target Date
	A. Expanding Your Support System	
<input type="checkbox"/>	1. COM Liaison: Start communicating with your assigned liaison. ASSIGNED AT SEPTEMBER COM MEETING	_____
		-
<input type="checkbox"/>	2. Spiritual Director: Provide the name of your chosen spiritual director to your COM liaison BY OCTOBER 31	_____
		-
	B. Administrative & Procedural Requirements	
	1. Forms for Prompt Submission:	
<input type="checkbox"/>	a. Waiver of Information (Form 2) DUE SEPTEMBER 30	_____
<input type="checkbox"/>	b. Financial Information (Form 3) DUE OCTOBER 31	_____
<input type="checkbox"/>	c. Background-Check forms (Form 7) DUE SEPTEMBER 30	_____
	2. Certificates and Transcripts	
<input type="checkbox"/>	a. Certificates of baptism, confirmation and/or reception DUE OCTOBER 31	_____
<input type="checkbox"/>	b. Official transcripts for all post-secondary education DUE OCTOBER 31	_____
<input type="checkbox"/>	3. Psychological Evaluation COMPLETED BY OCTOBER 31. Bring completed Form 4 and Form 5 to the appointment.	_____
	C. Formational Projects	
	1. Ministry Project – COMPLETED BY NOVEMBER 30	
<input type="checkbox"/>	a. Submit a ministry-project proposal for COM approval. DUE SEPTEMBER 15	_____
<input type="checkbox"/>	b. Submit a report on the completed project. DUE NOVEMBER 30	_____
<input type="checkbox"/>	2. Writing Project: Essay Reflections DUE OCTOBER 31	_____
	D. Moving Forward to Postulancy	
<input type="checkbox"/>	1. Discernment Retreat HELD IN DECEMBER	_____
<input type="checkbox"/>	2. Appointment with the Bishop	_____

CHECKLIST ~ Stage 3: Postulant

Please follow this checklist in stepwise order. Should you need clarification of any steps, please refer back to the instructions for **Stage 3** that are provided on pp. 12 - 14.

Completed		Target Date
	A. Medical Examination DUE JUNE 30 OF FIRST YEAR AS POSTULANT	_____
<input type="checkbox"/>	Submit Form 6 (Medical Examination)	
	B. Communication with the Bishop	
<input type="checkbox"/>	1. Setting Your Formation Plans DUE MARCH 31 OF FIRST YEAR AS POSTULANT Schedule an appointment, and meet with the bishop to discuss and set your plan of study and formation.	_____
<input type="checkbox"/>	2. Ember-Week Letters Submit a letter to the bishop during the Ember-Week cycle that follows each of the below-listed occasions:	
<input type="checkbox"/>	a. St. Lucy's Day, Dec. 13	_____
<input type="checkbox"/>	b. Ash Wednesday	_____
<input type="checkbox"/>	c. The Day of Pentecost	_____
<input type="checkbox"/>	d. Holy Cross Day, Sept. 14	_____
	C. Completing Your Formation	
	NOTE: Completion of these requirements typically begins during postulancy and continues into candidacy. Any of these requirements not completed during postulancy will need to be met during candidacy.	
<input type="checkbox"/>	1. Academic Study Undertake the academic plan developed with the bishop's approval.	_____
<input type="checkbox"/>	2. Field Education Participate in approved field education.	_____
<input type="checkbox"/>	3. Community-Service Placement Complete, as explained in the instructions for Stage 3.	_____
<input type="checkbox"/>	4. Transcripts and Certificates of Completion Submit transcripts and certificates.	_____
	D. Application for Candidacy	
<input type="checkbox"/>	1. Two Documents for Submission: a. Your Application Form_ (Form 10) DUE MARCH 1 OF YEAR PRIOR TO ORDINATION DATE	_____
<input type="checkbox"/>	b. Letter of Support from Sponsoring Congregation (Form 11) DUE MARCH 1 OF YEAR PRIOR TO ORDINATION DATE	_____
<input type="checkbox"/>	2. Interviews MARCH MEETINGS OF YEAR PRIOR TO ORDINATION DATE: a. Commission on Ministry	_____
<input type="checkbox"/>	b. Standing Committee	_____
<input type="checkbox"/>	3. The Bishop's Decision	_____

CHECKLIST ~ Stage 4: Candidate

Please follow this checklist in stepwise order. Should you need clarification of any steps, please refer back to the instructions for Stage 4 that are provided on 16 - 18.

Completed

Target Date

A. Completion of Requirements

1. Canonically Required Trainings [Canon III.6.5(g)]

You must complete and document these trainings *before* you will be allowed to apply for ordination:

- *Safe Church Safe Communities* **DUE SEPTEMBER OF YEAR PRIOR TO ORDINATION DATE** _____
- The Constitution and Canons of the Episcopal Church, particularly Title IV **DUE NOVEMBER OF YEAR PRIOR TO ORDINATION DATE** _____
- The Church's teaching on racism **DUE JANUARY OF YEAR OF ORDINATION DATE** _____

2. Formation Requirements

- a. **Academic Study**
Finish up any remaining coursework. _____
- b. **Field Education**
Complete any remaining field education. _____
- c. **Community-Service Placement**
If you did not complete this during postulancy, do so now. _____

- 3. Transcripts and Certificates of Completion
Submit transcripts and certificates. _____

- 4. **For Priesthood Candidates: The General Ordination Exams (GOEs)**
Schedule yourself for and take the GOEs. _____

- B. Ember-Week Letters
Continue writing Ember-Week letters to the bishop. _____

C. Application for Diaconal Ordination (vocational *and* transitional)

After you have completed and documented the *canonically required trainings* (see above), submit your application for diaconal ordination.

1. Two Documents for Submission DUE NOVEMBER 30 IN YEAR PRIOR TO ORDINATION DATE

Please submit these two forms to the bishop's executive assistant:

- a. **Your Application for Ordination to the Diaconate** ([Form 12](#)) _____
- b. **Letter of Support for Ordination to the Diaconate** ([Form 13](#)),
from vestry/bishop's committee of sponsoring congregation _____

2. Interviews JANUARY MEETINGS OF YEAR OF ORDINATION DATE:

- a. **Commission on Ministry** _____

- b. Standing Committee _____
- 3. The Bishop's Decision _____

D. **Application for Priestly Ordination** (for those on priesthood track)

Ordination to the priesthood may take place *after at least six months* since ordination to the transitional diaconate.

1. Two Documents for Submission DUE MAY 30 OF YEAR OF ORDINATION

Submit these soon after your ordination to the transitional diaconate:

- a. Your Application for Ordination to the Priesthood ([Form 14](#)) _____
- b. Letter of Support for Ordination to the Priesthood ([Form 15](#)),
from vestry/bishop's committee of sponsoring congregation _____

2. Interviews JULY MEETINGS OF YEAR OF ORDINATION:

- a. Commission on Ministry. _____
- b. Standing Committee _____
- 3. The Bishop's Decision _____