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

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	
☐	1. **COM Liaison:** Start communicating with your assigned liaison. **ASSIGNED AT SEPTEMBER COM MEETING**	_____
☐	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:**	
☐	a. **Waiver of Information (Form 2) DUE SEPTEMBER 30**	_____
☐	b. **Financial Information (Form 3) DUE OCTOBER 31**	_____
☐	c. **Background-Check forms (Form 7) DUE SEPTEMBER 30**	_____
	2. **Certificates and Transcripts**	
☐	a. **Certificates of baptism, confirmation and/or reception DUE OCTOBER 31**	_____
☐	b. **Official transcripts** for all post-secondary education **DUE OCTOBER 31**	_____
☐	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**	
☐	a. **Submit a ministry-project proposal for COM approval.** DUE SEPTEMBER 15	_____
☐	b. **Submit a report on the completed project. DUE NOVEMBER 30**	_____
☐	2. **Writing Project: Essay Reflections DUE OCTOBER 31**	_____
	D. Moving Forward to Postulancy	
☐	1. **Discernment Retreat HELD IN DECEMBER**	_____
☐	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 _____

☐ Submit Form 6 (Medical Examination)

B. Communication with the Bishop

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.

2. **Ember-Week Letters**

Submit a letter to the bishop during the Ember-Week cycle that follows each of the below-listed occasions:

☐ **a.** St. Lucy's Day, Dec. 13 _____
☐ **b.** Ash Wednesday _____
☐ **c.** The Day of Pentecost _____
☐ **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.

☐ 1. **Academic Study** _____
Undertake the academic plan developed with the bishop's approval.

☐ 2. **Field Education** _____
Participate in approved field education.

☐ 3. **Community-Service Placement** _____
Complete, as explained in the instructions for Stage 3.

☐ 4. **Transcripts and Certificates of Completion** _____
Submit transcripts and certificates.

D. Application for Candidacy

1. **Two Documents for Submission:**

☐ **a . Your Application Form** (Form 10) DUE MARCH 1 OF YEAR PRIOR TO ORDINATION DATE _____

☐ **b. Letter of Support from Sponsoring Congregation** (Form 11) DUE MARCH 1 OF YEAR PRIOR TO ORDINATION DATE _____

2 . **Interviews MARCH MEETINGS OF YEAR PRIOR TO ORDINATION DATE:**

☐ **a . Commission on Ministry** _____
☐ **b. Standing Committee** _____

☐ 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** _____