EDSD

COURAGEOUS LOVE

Discernment & Formation Handbook

3rd Edition (2023)

The Commission on Ministry

EPISCOPAL DIOCESE OF SAN DIEGO

(UPDATED OCTOBER 2026)

EPISCOPAL DIOCESE OF SAN DIEGO

Discernment and Formation Handbook

Grace to you and peace!

We are pleased to make available this updated version of the Discernment and Formation Handbook, which we hope will be a helpful resource, both for those who are considering ordained ministry as well as for the leaders and helpers who guide and accompany them in the discernment of God's call. With that in mind, we offer here a stepwise description of the discernment process, with instructions, and include checklists to help keep participants on track.

The discernment process in the Diocese of San Diego is guided by the **Commission on Ministry (COM)**, whose broad responsibilities include advising and assisting the bishop regarding the ministry of all baptized persons; coordinating the ordination process; recruiting, evaluating and recommending those who are called and prepared to serve God in the Church. Those who set out on the path of ministerial discernment will experience many points of contact with the COM and its members, who will be happy to answer questions about the process described in this handbook. Also, please know that you are always welcome to contact the chair of the commission directly at com@edsd.org.

May God bless and keep you always,

The Commission on Ministry
of the Episcopal Diocese of San Diego

A Brief Overview
of the
Discernment and Formation Process
for
Ordained Ministry

Discernment and formation are intertwining threads that tie together the steps and stages to ordained ministry. Through an ongoing process of shared discernment, the inquirer and God's People—the Church—explore how God may be calling the inquirer to use her/his gifts to proclaim the Good News of Jesus Christ. Formation is likewise a process—a process of ministerial growth and development that includes spiritual reflection, academic studies, field education, congregational internships, community-service placements, etc. Those who initiate this journey of discernment and formation may, in time, find themselves on the path to ordained ministry by way of **four distinct stages**, which are described below in very general terms**:**

1. **Inquirer**
   During this initial stage of discernment, the inquirer engages in exploratory conversations and meetings that may lead to formal application for *nominee* status. Typically, this part of the process spans about a year. Fuller details for this and the other stages can be found elsewhere in this handbook.

2. **Nominee**
   The nominee continues the discernment that was begun as an inquirer, but more intentionally and with greater focus. This stage includes completing various administrative requirements, psychological evaluations, and also some formational projects. At the end of this stage, the nominees will join the bishop and the COM in a discernment retreat, after which the bishop will let each one know whether they advance to the *postulant* stage.

3. **Postulant**
   During the postulant stage, the discerner typically assumes greater involvement in academic, spiritual, and practical formation for ordained ministry, as approved in consultation with the bishop. With essential input from the COM and the diocese's Standing Committee, the bishop will decide on the postulant's admission to the *candidate* stage.

4. **Candidate**
   At this stage, the candidate completes any remaining requirements and undergoes final evaluations of readiness for ordained ministry. Final approval for ordination will come from the bishop, following the required input from the COM and the Standing Committee. Candidacy ends at ordination for vocational deacons, but for those on the priesthood track, it continues past diaconal ordination until priestly ordination.

Stage 1: Inquirer

The ***inquirer*** stage, which may conclude with your congregation recommending you for the ***nominee*** stage, is analogous to the information-gathering, decisions, and preparations one makes to ensure a good start to a significant journey. The various steps of the inquiry stage are designed to help you and the Church community discern Gods' will regarding a call to ordained ministry. Although you may be the first to sense the call, the discernment of an ordained vocation is not your purview alone, for the People of God are always an integral part of this process.

A. Getting Started

Here follows a list of the required ***preliminary activities*** that will guide your entry into the inquiry process.

1. **Congregational Participation and Residence**
   Prior to any formal application, we require that you already be a resident member of a congregation within the Episcopal Diocese of San Diego for at least one year. This provides time for you to have lived and worshipped in this diocese and, ideally, for your sponsoring clergy to have gotten to know you.

2. **Meetings with Your Congregation's Clergy-in-Charge**
   You will need to meet with the clergy member in charge of your congregation to discuss your perceived call by God, and you may initiate these conversations six months into your residency. This is an essential first step, as your clergy's letter of recommendation will be required for you to continue this journey.

3. **Listening Hearts Conversation**
   You may, in consultation with your clergy-in-charge, schedule a Listening Hearts conversation for further guidance regarding your ministerial discernment. A small group of trained discerners will pray, listen, and explore with you your call to serve God. You can make these arrangements with the chair of the COM.

4. **Commission on Ministry (COM) Day of Information**
   This informative event usually takes place in the Fall, but you may request permission from the bishop to watch a video of it as an alternative, if one is available, at edsd.org/commission-on-ministry/. Please register in advance of the meeting, by following the details announced in the diocesan newsletter or by contacting Erin McDougal, the bishop's executive assistant (EMcDougal@edsd.org, 619-481-5454). The purpose of this event is to introduce you to the journey of discernment and formation, and to describe the commitment you and others will be making along the way. After experiencing this meeting, you should continue the conversation with your congregation's clergy and, if you are in mutual agreement, move forward with the next steps.

B. Following Through to Nomination

When you have completed the above activities of prayerful inquiry and discernment, and if you and your sponsoring clergy member feel that you are ready to seek nomination to the formal process of ordination discernment, then please continue stepwise through the following, as indicated.

How to Submit Forms, Documents, Letters, etc.
Please submit all requested materials to the
***Executive Assistant to the Bishop*: Erin McDougal**
(EMcDougal@edsd.org, 619-481-5454),
who will direct them to the appropriate recipients.

1. **Submission of Initial Application Materials – DUE JANUARY 15**
   Please submit the below-listed application-documents to the bishop's executive assistant (see contact info above).

   - **Spiritual Autobiography**
     All of us have a spiritual autobiography to tell, and no two people's stories are the same. You are to write a concise account of your spiritual journey to date, with particular attention to those moments when you felt God leading you to the call you are now discerning.
   - **Biographical Information** (Form 1, *Discernment for Ordination Application and Social History)*
     This questionnaire asks you to share basic information about your personal, family, and religious history, and to describe the ministry that you envision as an ordained person. You will need to submit references and a digital photograph of yourself along with the completed questionnaire. At this time you should also begin the work of locating your baptismal and confirmation (or reception) records (which will be due October 31).
   - **Letter of Recommendation from Sponsoring Clergy Member**
     Along with your spiritual autobiography and biographical information, you will also submit a letter from your clergy sponsor that recommends to the bishop that you continue discernment about ordination. The letter should reflect the clergy member's conversations with you, as well as their overall knowledge of you, your past and current ministries in the Church, and their reasons for believing your call to be from God.

2. **Parish Discernment Committee (PDC) – TO BE COMPLETED BY JULY 15**
   After you have completed and submitted all three of the application materials indicated above, your next step will be to participate in conversations with a ***Parish Discernment Committee***. It cannot be overemphasized that all discernment of ordained ministry occurs in partnership with the Church—the People of God—and is not just a matter of the individual's own discernment. To request and initiate this bilateral process of discernment, please contact our Discernment-Conversations Coordinator discernment-conversations@edsd.org, who will identify two trained conveners to guide a PDC that will include people from your congregation. Your sponsoring clergy, with input from you, will appoint the congregational members, and their selection should consider their capacity for faithful, objective listening. Ultimately, the PDC's purpose is to discern with you the type of ministry to which God calls you, even if that might differ from what you currently

understand it to be. All participants in the PDC should approach this discernment with open hearts and minds, and without foregone conclusions. To achieve that degree of objectivity, it is wisest to choose PDC members who are ***not*** your closest friends and supporters. Together with your sponsoring priest, you should look for PDC members who are wise, prayerful, and committed to asking careful, discerning questions. After the series of PDC meetings has concluded, the committee will create a report that summarizes your conversations and explains their conclusions. They will submit the report to your sponsoring clergy, to the vestry/bishop's committee, and to the bishop's executive assistant (see contact info above) for confidential sharing with the bishop and the COM.

3. **Vestry Nomination – TO BE COMPLETED BY JULY 31**
   Once the final PDC report has been submitted to all parties, the sponsoring clergy member will put your nomination on the vestry/bishop's committee agenda. Following an affirmative vote, the vestry/bishop's committee will formalize your nomination in a Letter of Nomination (Form 8), which they must then submit to the bishop's executive assistant (see contact info above).

4. **Interview with the Commission on Ministry – AUGUST COM MEETING**
   After the Letter of Nomination from the vestry/bishop's committee has been submitted, the COM will schedule an interview with you, and then vote on recommending you to the bishop for nominee status.

5. **Notification from the Bishop**
   The bishop, after considering the COM's recommendation and reviewing the input submitted through this process, will decide whether to move you forward as a nominee, and then notify you of the decision.

6. **Your Formal Acceptance of Nominee Status – AS SOON AS POSSIBLE AFTER RECEIVING VESTRY NOMINATION (FORM 2)**
   Upon notification by the bishop of an affirmative decision, you will need to submit to the bishop a written letter of acceptance in order to become a nominee. ***Canonically, a formal discernment process of NO LESS THAN 18 months will begin on the date of your acceptance***, but it may take longer than that to complete formal training or other steps as required for the process. Depending on your particular circumstances, as well as on your good attention to the steps of the process, you may be eligible for ordination after 18 months of formal discernment—but please follow the instructions for the coming stages closely!

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 – DUE 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**	_____

Stage 2: Nominee

Having fruitfully completed your initial inquiry and discernment, you will now explore more deeply the possibility that God may truly be calling you to ordained ministry. Formerly, you would have been called an "aspirant" at this stage, but the expression *nominee*—the current canonical designation—reminds us that the People of God, acting through your congregation and the diocese, participate integrally with you, and raise you up, in the discernment of your calling. You now enter into full engagement with formation and the process, which among other activities will include connecting regularly with a spiritual director, proposing and carrying out your own ministry project, and submitting the application materials specific to this stage.

If you somehow have not yet submitted to the bishop **a written acceptance of your nomination**, please know that your status as a nominee will only begin upon the bishop's reception of your letter. Your written acceptance is specifically what initiates the canonically-required ***18-months minimum*** of discernment and formation that must be completed before admission to ordination. However, depending upon your particular circumstances, it may take longer than that to complete formal training or other steps of the process.

We readily acknowledge that keeping up with all of this can be challenging, so please do your best to complete everything in an organized and timely manner, so that you can submit the last of your requirements by at least a couple weeks ahead of the discernment retreat. Should you have even small concerns or issues regarding any aspect of the process, we encourage you to bring them to the COM chair (com@edsd.org), or to your liaison, as soon as you become aware of them.

Please submit all requested materials to:
The Executive Assistant to the Bishop, Erin McDougal
(EMcDougal@edsd.org, 619-481-5454),
who will direct them to the appropriate recipients.

A. Expanding Your Support System

By this point in your life, you likely enjoy a circle of support, intimately small or expansively large, that may include family, friends, a significant other, clergy, parish members, or yet others. Now that you are a nominee, a couple of additions to that circle will be appropriate, as indicated below.

1. **COM Liaison – ASSIGNED AT SEPTEMBER COM MEETING**
   To foster supportive contact with you, and to ensure that the bishop and the COM stay up to date on your progress, the Commission on Ministry will appoint one of its members to maintain meaningful communication with you (in-person, Zoom, email, etc.) on a monthly basis. This regular interaction with a liaison starts with the nominee stage and continues through the subsequent stages of the ordination process.
2. **Spiritual Director – IDENTIFIED BY OCTOBER 31**
   If you have not already initiated a confidential relationship with a spiritual director, you should do so right away at the outset of your nominee status. Your spiritual director should have training in spiritual direction, and may ***not*** be your clergy sponsor, who serves a distinct

and separate role in your discernment. Although spiritual direction may intersect at times with your exploration of a call to ordained ministry, its main objective is to deepen your life of faith. Please provide the name of your spiritual director to your COM liaison.

B. Administrative & Procedural Requirements

To ensure that the following are completed in a timely manner, please attend to them as soon as possible, and submit them to the bishop's executive assistant.

1. **Forms for Prompt Submission:**
   a. **Waiver of Information** (Form 2) – DUE SEPTEMBER 30
   b. **Financial Information** (Form 3) – DUE OCTOBER 31
      If your information on this form includes a request for financial aid, then be sure to submit it by ***October 31*** of the year before such assistance would be applicable.
   c. **Background-Check forms – DUE SEPTEMBER 30**
      To get started with the background-check materials, please contact the bishop's executive assistant (Erin McDougal, EMcDougal@edsd.org, 619-481-5454), to whom you will also submit all required forms. You will share the cost of a credit and criminal background check with your congregation. The check is payable to EDSD. You will also need to complete Form 7 granting us permission to do the background check.
2. **Certificates and Transcripts – DUE OCTOBER 31**
   Some of these may take a while to locate or to obtain, so it will be best not to delay searching for them.
   a. **Certificates of baptism, confirmation and/or reception** (or parish documents certifying them). Photocopies are acceptable.
   b. **Official transcripts** for all post-secondary education
3. **Psychological Evaluation – COMPLETED BY OCTOBER 31**
   a. **Evaluation**
      Please schedule your psychological evaluation appointments with Dr. Suzanne Watson, M. Div, by phone or text at 858-755-1901 or by email at drwatson@delmarpsychiatry.com. If you would like to learn more about Dr. Watson's background and practice, please visit https://delmarpsychiatry.com/.

      The total time for the psychological evaluation is approximately six to eight-hours over two to three visits that are held both in person and by video. The initial appointment covers the nominee's family of origin, personal and work history, and may include testing if time allows. If testing is not completed an additional appointment will be scheduled. A concluding appointment includes clarification of emerging psychological issues, test feedback and issues related to the aspirant's wellness in the future. The first appointment will be in-person. Testing may occur either in-person or online or a combination of both. The concluding appointment may be in person or by video.
      Please complete the three forms listed below and provide them to Dr. Watson and to the bishop's executive assistant before your scheduled meetings.

- Life History Questionnaire (Form 4)
- Behavioral Screening Questionnaire (Form 5)
- EDSD Waiver of Information (Form 2)

b. Reports

Based on information collected in the history form, the psychological tests and the interviews, Dr. Watson prepares and forwards to the Diocese her report. The Diocese is the owner of the report.

C. Formational Projects

Ministry Project – COMPLETED BY NOVEMBER 30 The ministry project provides an opportunity for you to envision and implement a short-term ministry, either in your congregation or in the community. Here is how to proceed:

a. Submit a ministry-project proposal for COM approval. – DUE BY SEPTEMBER 1

Prior approval of the COM is required. And so, before starting anything, please submit a one-page project-proposal to the bishop's executive assistant, who will forward it to the COM for approval. Your ministry project should:

- be designed with the support and agreement of your clergy sponsor;
- involve you in an activity of Christian faith and leadership;
- preferably be something that adds to, and is different from, what is already being done in your congregation;
- include other people in its implementation;
- be manageable enough to complete in six weeks to six months.

b. Submit a report on the completed project.

Upon completing your ministry project, submit a final report accompanied by your clergy sponsor's signed reflections on the project's process and outcome. In the interest of exploring what you learn in this project, we hope to see your theological reflection based on your experience, as well as anything you might have learned as a leader within a faith community context.

2. Writing Project: Essay Reflections – COMPLETED BY OCTOBER 31

Please reflect on the following questions by writing thoughtful personal responses to them.

a. Who is Jesus Christ to you, and what is the Good News that we are called to proclaim by word and example?

b. How in our demographically diverse diocese, and to whom, do you envision yourself sharing the Good News of Christ through ordained ministry? How would that be different from your ministry as a lay person?

c. What is your vision of spiritual leadership for the Church and for the world? How have you seen that kind of leadership enacted in your own life and ministry?

d. Describe your spiritual practices and comment about God's place in your life.

D. Moving Forward to Postulancy

1. **Discernment Retreat – HELD IN DECEMBER**
   If you have completed all of the above tasks, activities, and submissions, the COM and the bishop will invite you to participate in some pivotal moments of discernment during a prayerful, well-organized retreat. Prior to the retreat, the COM will have reviewed all of your application materials (with the exception of the confidential materials that are read only by the bishop and the COM chair). You will spend the day in quiet reflection, in prayer, and in thoughtful conversations with the members of the COM, the Bishop, and others as invited. Following the retreat, the COM will make a recommendation to the bishop about each nominee's advancement to postulancy. Shortly after deciding, the bishop will communicate the respective decision to each nominee.
2. **Appointment with the Bishop**
   If affirmed to move on to the postulant stage, you will be invited to meet with the bishop to discuss your call to ordained ministry. To make an appointment, contact the bishop's executive assistant.

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**	_____

Stage 3: Postulant

As your discernment continues into the postulant stage, your specific ministerial formation will involve academic study, consultations with a spiritual director, field education, and other experiential training. The time you spend as a postulant may vary, as it reflects the pace of your course of study and preparation.

Please submit all requested materials to:
The Executive Assistant to the Bishop, Erin McDougal
(EMcDougal@edsd.org, 619-481-5454),
who will direct them to the appropriate recipients.

A. Medical Examination – DUE JUNE 30 OF FIRST YEAR OF POSTULANCY

As soon as you can, schedule a routine physical exam with your physician. You will need to take Form 6 (Medical Examination) with you to the exam, so that the doctor can fill it out and sign it.

B. Communication with the Bishop

1. **Setting Your Formation Plans – COMPLETED BY MARCH 31**
   With admission to postulancy, the bishop will be in dialogue with you to determine and approve your plan of study and formation. This plan will take into consideration your particular life circumstances, your formation background, and whether you are preparing for the vocational diaconate or the priesthood. In recent years, our seminarians have participated in a variety of courses of study—a couple of them offered in Spanish—that have included residential, commuter, and online programs. To schedule this appointment, please contact the bishop's executive assistant.

2. **Ember-Week Letters**
   As a postulant—and also later as a candidate—you are canonically required to submit a letter to the bishop during each of the Ember-Week cycles that follow the occasions listed below. The letter should reflect on your academic, personal, spiritual, and formational development.

   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

Completion of these requirements typically begins during postulancy and continues into candidacy, depending on the scope and timing of one's formation plan.

1. **Academic Study**
   Undertake the academic plan that you developed with the bishop's approval.

2. **Field Education**
   All who are preparing for the diaconate or the priesthood are required to take two semesters of field education. You will work with the bishop on finding a suitable field education placement. Field Education involves a supervised placement in a congregation for ministerial

work, and includes classroom work, reading, and theological reflection on your experiences in church leadership and ministry.

3. **Community-Service Placement**
   All are also required to meet a community-service requirement, which may be met during either the postulant or candidate stage, as follows:

   - **Vocational-diaconate** postulants/candidates may meet this requirement with ***either*** a summer placement in a community-service organization ***or*** a unit of CPE.
   - **Priesthood** postulants/candidates take a unit of Clinical Pastoral Education (CPE), which involves a supervised placement in a hospital or other community ministry, or participate in a comparable chaplaincy or pastoral care experience.

4. **Transcripts and Certificates of Completion**
   Upon completion of the various components of formation, please submit transcripts and certificates of completion to the bishop's executive assistant.

D. Application for Candidacy

Because the length of postulancy can vary greatly, depending on the duration of one's studies and other preparation, you will need to work out the timing of your application for candidacy in consultation with the bishop and/or the COM.

1. **Two Documents for Submission**
   a. **Your Application Form DUE MARCH 1 OF YEAR PRIOR TO ORDINATION DATE**
      At the point in time determined in prior consultation with the bishop and/or the COM, submit the Application for Candidacy (Form 10) to the bishop's executive assistant.

   b. **Letter of Support from Sponsoring Congregation DUE MARCH 1 OF YEAR PRIOR TO ORDINATION DATE**
      Concurrently with your application for candidacy, the vestry/bishop's committee of your sponsoring congregation will submit a Letter of Support for Candidacy (Form 11) to the bishop's executive assistant.

2. **Interviews**
   a. **Commission on Ministry. MARCH MEETING IN YEAR PRIOR TO ORDINATION DATE** Upon receiving the above two documents, the COM will schedule an interview with you, typically during a monthly meeting on the *second* Tuesday of the month. Following this interview, the COM will make its recommendation to the bishop regarding your advancement to candidacy.

   b. **Standing Committee. MARCH MEETING IN YEAR PRIOR TO ORDINATION DATE** The bishop will then request approval of your candidacy from the diocese's Standing Committee, which will schedule an interview with you, typically during a monthly meeting on the *third* Tuesday of the month. In terms of timing, it is likely that your interviews with the COM and the Standing Committee will take place in adjacent weeks.

3. **The Bishop's Decision.** Shortly after the above two interviews, the bishop will notify you of her/his decision concerning your appointment as a candidate for ordination.

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** _____

Stage 4: Candidate

During candidacy, you will continue your discernment and formation, and also finish whatever may remain of your academic studies, field education, and community-service placement(s). At this fourth stage, you may feel growing excitement as you anticipate the ordained ministry that you and God's People—the Church—have been exploring together. Keep in mind, though, that there are still final recommendations and approvals to be received, each of which involves further consideration of God's call to you. We encourage you to approach these last steps of ordination-discernment in a spirit of patience and humility.

Please submit all requested materials to:
The Executive Assistant to the Bishop, Erin McDougal
(EMcDougal@edsd.org, 619-481-5454),
who will direct them to the appropriate recipients.

A. Completion of Requirements

As a postulant, you may have initiated and perhaps completed some of the below-listed requirements, and you will now as a candidate complete any that remain. Upon completion of formation requirements and trainings, ***please submit*** the respective transcripts or certificates of completion to the bishop's executive assistant.

1. **Canonically Required Trainings and Evaluation** [Canon III.6.5.(g, j)]
   The Canons of The Episcopal Church require you to take the below-listed trainings and complete a thorough background check, all of which you ***must*** complete (with documentation) ***before*** you will be allowed to apply for ordination:
   - *Safe Church Safe Communities* **COMPLETED BY SEPTEMBER OF YEAR PRIOR TO ORDINATION DATE**—an online training program that covers these canonically-required areas of training:
     - Prevention of sexual misconduct against both children and adults
     - Civil requirements for reporting and pastoral opportunities for responding to evidence of abuse
   - The Constitution and Canons of the Episcopal Church, particularly Title IV **COMPLETED BY NOVEMBER OF YEAR PRIOR TO ORDINATION DATE**
   - The Church's teaching on racism **COMPLETED BY JANUARY OF YEAR OF ORDINATION DATE**
   - Oxford Background Check. Please contact Erin McDougal to arrange for the background check. The cost is $200. Financial assistance is available if required. **MUST BE REQUESTED BY OCTOBER OF YEAR PRIOR TO ORDINATION DATE**.
2. **Formation Requirements**
   Complete whatever may remain of the below-listed 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 requirement during postulancy, you need to do so now, as specified below:
- **Vocational-diaconate** candidates may meet this requirement with ***either*** a summer placement in a community service organization ***or*** a unit of CPE.
- **Priesthood** candidates fulfill this requirement with a unit of CPE or comparable chaplaincy/pastoral care experience.

3. **Transcripts and Certificates of Completion**
If there are any transcripts or certificates of completion that you haven't yet submitted, please forward them to the bishop's executive assistant.

4. **For Priesthood Candidates: The General Ordination Exams (GOEs)**
In January, you will sit for the GOEs, which will be administered locally on behalf of The Episcopal Church's General Board of Examining Chaplains. A series of exams will assess your proficiency in six areas:
- History of the Christian Church
- Christian Theology
- The Holy Scriptures
- Christian Worship
- Christian Ethics and Moral Theology
- The Practice of Ministry

B. Ember-Week Letters

Through the remainder of the ordination process, continue writing the periodic Ember-Week letters to keep the bishop apprised of your progress. The letters should reflect on your academic, personal, spiritual, and formational development.

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

As soon as possible during candidacy—***but only after*** you have completed the ***canonically required trainings*** (see above)—you should submit your application for diaconal ordination.

1. **Two Documents for Submission**
Please submit these two forms to the bishop's executive assistant:

   a. **Your Application for Ordination to the Diaconate (Form 12)DUE NOVEMBER 30 OF YEAR PRIOR TO ORDINATION DATE**

   b. **Letter of Support for Ordination to the Diaconate (Form 13) DUE NOVEMBER 30 OF YEAR PRIOR TO ORDINATION DATE**
   The vestry/bishop's committee of your sponsoring congregation will consider and submit the Letter of Support, but we urge you to keep track of the calendar to ensure it is completed and received by the bishop's executive assistant in a timely manner.

2 . **Interviews JANUARY MEETINGS IN THE YEAR OF ORDINATION**

   a . **Commission on Ministry.** Upon receiving the above two documents, the COM will schedule an interview with you, typically during their monthly meeting on the

second Tuesday of the month. After this interview, the COM will forward its recommendation to the bishop.

b. **Standing Committee.** The bishop will then request approval of your diaconal ordination from diocese's Standing Committee, which will schedule an interview with you, typically during their monthly meeting on the *third* Tuesday of the month.

3. **The Bishop's Decision.** Shortly after the above two interviews, the bishop will notify you of her/his decision concerning your ordination to the diaconate. Only at this point should you expect finalization of the date and plans for your ordination.

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

Canon III.8.7(a)(1) stipulates that ordination to the priesthood may take place ***after at least six months*** since one's ordination to the transitional diaconate.

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

   Soon after your ordination to the transitional diaconate, submit these two forms to the bishop's executive assistant:

   a. **Your Application for Ordination to the Priesthood (Form 14)**

   b. **Letter of Support for Ordination to the Priesthood (Form 15)**
   The vestry/bishop's committee of your sponsoring congregation will consider and submit the Letter of Support, but we encourage you to take the initiative to ensure this is completed and received by the bishop's executive assistant in a timely manner.

2. **Interviews JULY MEETINGS OF THE YEAR OF ORDINATION DATE**

   a. **Commission on Ministry.** Upon receiving the above two documents, the COM will schedule an interview with you, after which the COM will forward its recommendation to the bishop.

   b. **Standing Committee.** At the bishop's request, the Standing Committee will interview you, and then vote to approve your ordination to the priesthood.

3. **The Bishop's Decision.** Shortly after the above two interviews, the bishop will notify you of her/his decision concerning your ordination to the priesthood. Only at this point should you expect finalization of the date and plans for your ordination.

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:**

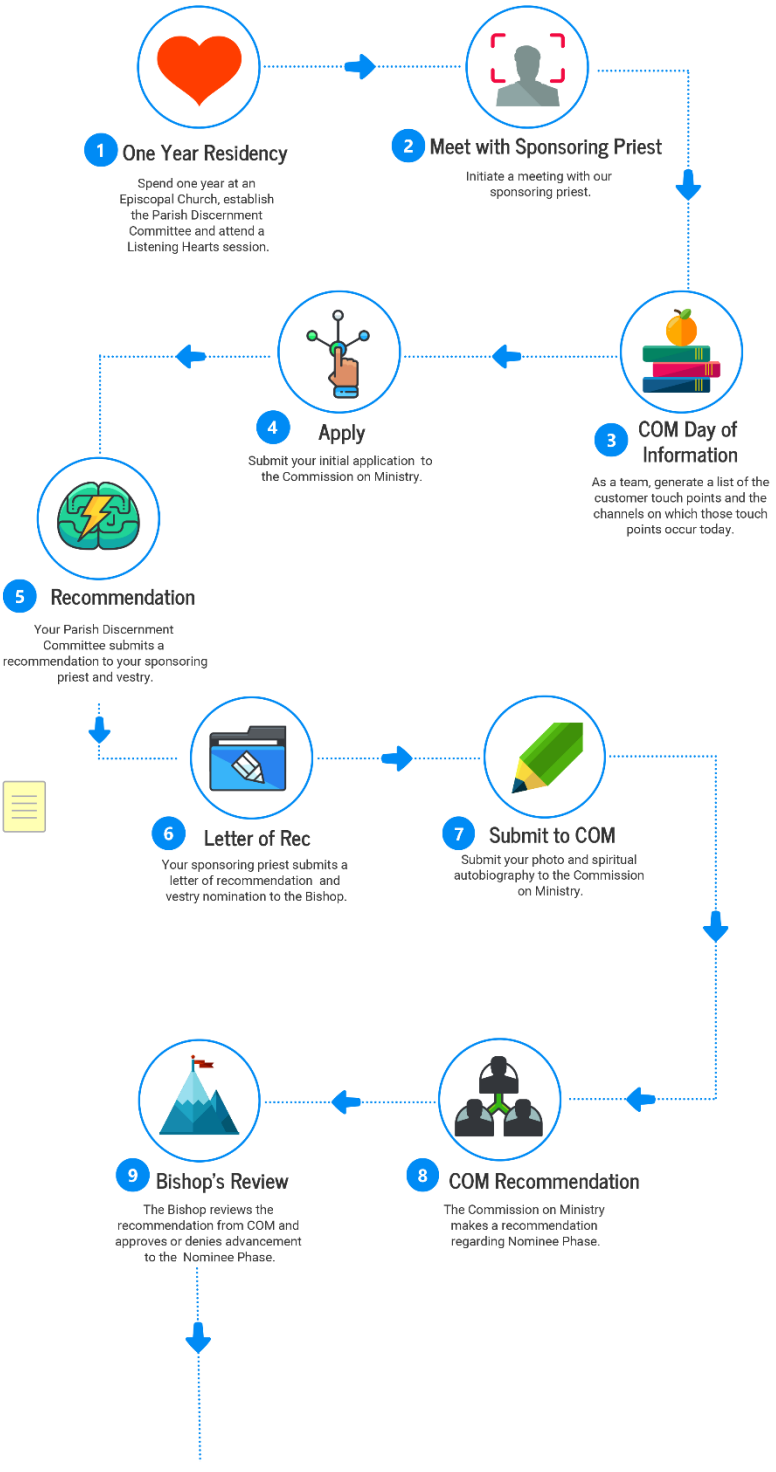
☐ a. **Commission on Ministry.** _____

☐ b. **Standing Committee** _____

☐ 3. **The Bishop's Decision** _____

Inquiring Phase

Commission on Ministry



Nominee Phase

Commission on Ministry



1 Written Acceptance

Submit your written acceptance of your nomination to the Bishop.



2 Background Check

Submit to the Diocese the provided waiver to preform a background check.



3 Financial Info

Submit the provided financial information document. If applicable, include your request for financial aid.



4 Psychological Process

Complete the initial Psychological Interview. Provided forms will be submitted confidentially to the COM chair and the Bishop. After initial review, you will complete the full psychological evaluation.



5 Submit Documents

Submit certificates of baptism, confirmation, and/or reception. Submit official transcripts for all post-secondary education.



6 Spiritual Direction

Select a Spiritual Director and submit their information to COM



7 Ministry Project

Submit a Ministry Project proposal for COM approval. Report your final Ministry Project to COM for approval.



8 Bishop's Review

Schedule a meeting with the Bishop. The Bishop reviews the recommendation from COM and approves or denies Postulancy.

Postulancy Phase

Commission on Ministry



1 Medical Evaluation

Complete the Medical Evaluation. This is submitted confidentially to the COM chair and the Bishop.



2 Formation Plans

Meet with the Bishop regarding your formation plans.



3 Formation

Complete formation as directed. Submit your transcripts to COM.



4 Application for Ordination

Complete your Application for Candidacy for Ordination and submit it to COM.



5 Letter of Support

Sponsoring Vestry submits your letter of support for Candidacy to COM.



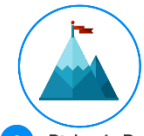
6 COM Interviews

COM interviews the postulant for candidacy and makes a recommendation to the Bishop.



7 Standing Committee Interviews

The Standing Committee interviews the postulant for candidacy and makes a recommendation to the Bishop.



8 Bishop's Review

The Bishop reviews the recommendation of COM and the Standing committee and approves or denies candidacy.

Candidacy Phase

Commission on Ministry



1 Episcopal Church Requirements

Complete the requirements of the Episcopal Church, including Safeguarding God's People and the teaching on anti-racism.



2 Apply for Diaconal Ordination

If on track to the priesthood, apply at least six months before ordination to the diaconate.



3 Letter of Support

The Sponsoring Vestry submits a letter of support for your Diaconal Ordination.



4 GOE & CPE

If on track to the priesthood, you must complete the Clinical Pastoral Care and pass your General Ordination Exam.



5 COM Interviews

COM interviews and makes a recommendation to the Bishop for Diaconal Ordination.



6 Standing Committee Interviews

The Standing Committee interviews and makes a recommendation to the Bishop for Diaconal Ordination.



7 Bishop's Review

The Bishop reviews the recommendation of COM and the Standing committee and and sets your ordination date.



8 Ordination

God willing, and the people consenting, the Bishop will ordain you to the Diaconate.