

# Discernment Guide for Holy Orders



The Episcopal Diocese  
of Upper South Carolina



# DISCERNMENT PROGRAM FOR HOLY ORDERS

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## The Episcopal Diocese of Upper South Carolina

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# Inquirer and Sponsoring Priests

## The Episcopal Diocese of Upper South Carolina

### INQUIRY PERIOD

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The Sponsoring Priest of a person entering into vocational discernment is the first official contact the Inquirer will have. It is, therefore, incumbent upon each to be intimately familiar with how the Diocese of Upper South Carolina expects this process to be handled and with the specific steps that are outlined in these documents. Because the primary relationship of the Inquirer and Sponsoring Priest will always be pastoral, failure to understand the process can result in confusion, hurt feelings, and potential problems within the parish. Also, uniformity of process across all churches in the diocese will ensure that expectations are clear and individuals are treated equally.

It is important that the Inquirer understands what we have traditionally referred to as “the process” is actually two distinct and very different periods of time: the first is the **inquiry period**, in which the person, in concert with the Church, discerns their call; the second is the **ordination process** that begins with the granting of postulancy to the individual.

#### To the Sponsoring Priest:

As both Sponsoring Priest and pastor, remember that it is often a kindness to stop a person before they become too invested in the journey if you believe strongly that they are not suited for ordained ministry. If you have questions or doubts, please call the Canon for Christian Formation, Congregational Vitality, and Missional Communities to discuss the situation. Again, this is a kindness that you, as the pastor, are called to perform.

The time shared between Inquirer and Sponsoring Priest is intended to be spent exploring and discerning a vocational call. Areas to be included in this discernment discussion are:

- Vocation and spirituality
- Leadership skills and ability
- Personal background information
- Physical and mental health
- Financial health
- Family
- Biblical engagement

The included section, "Clergy: Core Values, Fundamental Competencies, and Norms," should serve as the metric against which all your conversations with the Inquirer are based. As it says in the introduction, “While it is not expected that individuals possess all of the qualities that are listed in this document, it is important for those in discernment to exemplify a majority of the traits listed below.” Also, please encourage the senior warden to attend a couple of the discernment conversations with the inquirer. The senior warden will be asked to write a recommendation for entrance into the diocesan discernment program. As such, it is important for this person to gain a clear sense of the inquirer’s vocational call.

The following is a list of resources to be used in this conversation to ensure that the individual meets the baseline requirements for application to the diocesan process for Vocational and Ministry Discernment. All reports should be carefully reviewed and any irregularities thoroughly discussed.



IMPORTANT NOTE: If the Inquirer moves forward in the process, there will be more thorough checks performed in the areas of Personal Background Information. If anything of concern that has not yet been disclosed may show up as a result of more extensive checking, please disclose it now.

## Vocation and Spirituality

In addition to “Clergy: Core Values, Competencies and Norms,” a guided reading of a particular book on vocation and spirituality can be helpful to the Inquirer. Recommendations of such books include:

- [Let Your Life Speak](#), Parker Palmer
- [The Rule of Benedict: A Spirituality for the 21<sup>st</sup> Century](#), Joan Chittister
- [Spirituality for Ministry](#), Urban T. Holmes
- [Ministry and Imagination](#), Urban T. Holmes (specifically for priests preparing to serve as a sponsor)

## Personal Background Information

The Inquirer should prepare responses to a series of **short essay questions** (included in Section IV of the application) detailing aspects of their life history and spiritual development and examine them with the Sponsoring Priest. Other documents regarding education and work history will also need to be collected.

The Inquirer must perform a [baseline background check](#) and discuss the results with the Sponsoring Priest. If the Inquirer has **resided in more than one state during the past decade**, they will need to conduct a background check from the other state(s) of residence, as well. Please contact The Canon for Christian Formation, Congregational Vitality, and Missional Communities for assistance if needed.

**Upon admission into the discernment program**, as well as within thirty-six months prior to any ordination, an order will be placed by The Canon for Christian Formation, Congregational Vitality, and Missional Communities for a more extensive background check performed by [Oxford Document Management Company](#). The cost of this check ranges from \$300-\$400, and the Inquirer will be financially responsible once the check is completed. The Inquirer may receive financial support from their sponsoring parish for this expense.

## Physical and Mental Health

Prior to admission to the discernment program, the Inquirer must discuss with the Sponsoring Priest the results of a medical physical. A medical physical must also be completed within thirty-six months prior to any ordination. This [medical form](#)\* must be brought to the physical appointment.

A psychological assessment must also be performed one month before the initial discernment application due date as a piece of the Inquirer’s completed application as well as thirty-six months prior to any ordination. [Dr. Rhea Merck](#) is the administrator of this assessment and must be contacted directly to schedule the assessment. Once the results are available, Dr. Merck will send a copy to the Diocesan House upon the Inquirer’s permission. She may be reached via phone at **803-771-6684**.

The Inquirer will need to bring a completed copy of the [Behavior Screening Questionnaire](#)\* and [Life History Questionnaire](#)\* to the appointment.

\*Please retain copies of completed documents for your own records

## Financial Health and Commitment

Successful completion of the inquiry period and ordination process will result in financial burdens associated with seminary or other formation, possible relocation and change in income. It is vitally important and pastorally crucial that we do not put the Inquirer in an untenable financial position. Therefore, the Inquirer is expected to obtain a [baseline financial snapshot](#) and discuss it with the Sponsoring Priest.

If accepted into the Diocesan Discernment Program the approximate cost to fulfill the canonical requirements related to the discernment of Holy Orders ranges between \$2,000 and \$3,000. Funding for a background check, psychiatric testing, medical exam, mileage related to internships, and retreats will need to be provided by the Inquirer and sponsoring congregation. (It is a canonical requirement that all sponsoring congregations pledge to contribute financially to discernment and formation expenses related to Holy Orders.)

## Family

The impact on the family of an Inquirer can be profound. The Sponsoring Priest must, therefore, ensure that the Inquirer has the full support of family and loved ones. It is strongly suggested that in the case of partnered Inquirers, at least one session with the Sponsoring Priest include both the Inquirer and partner. If the Sponsoring Priest deems it necessary, a private meeting with the Inquirer's partner is not an unreasonable request and should be done. This, too, goes directly to the pastoral role of the Sponsoring Priest, as the care for not only the Inquirer but the Inquirer's family and loved ones is the priest's charge.

## Vocational and Ministry Discernment Time Requirement and Document Management

It is realistic to allow approximately two years in discerning your vocation and call to ministry. This will allow time for discernment with your Sponsoring Priest and, if accepted, participation in the Diocesan Vocational and Ministry Discernment Program.

**IMPORTANT NOTE:** The Inquirer must understand they are responsible for maintaining originals of all documents, academic work, etc. required throughout the discernment process and beyond. While copies of the submitted documents are kept and filed by the Diocesan House, there is an expectation that the Inquirer manage their work and submit each application packet fully complete rather than one form or document at a time.

## Final Steps

At the end of this portion of the inquiry period, the Sponsoring Priest will need to decide whether they can, in good conscience, write a letter of recommendation indicating that the Inquirer should continue discernment. If so, the Inquirer will complete the application process for Vocational and Ministry Discernment. If not, the Sponsoring Priest should be prepared to assist the Inquirer in discerning to which other ministries in the church the Inquirer might be called. This is not a binary process of "yes/no." Rather, the inquiry period is one in which we can lift up leaders of other ministries beyond that of the ordained.

Additionally, this is a conversation the Sponsoring Priest must be prepared to have with the Inquirer should they continue into the next step but not be recommended to move into the ordination process.

If any part of the role of Sponsoring Priest, or any potentially difficult conversations with the Inquirer seem daunting, please remember that both diocesan staff and members of the Commission on Ministry are available to advise, guide, and, if necessary, take part in such conversations.



# Core Values, Competencies, and Norms for Clergy

## The Episcopal Diocese of Upper South Carolina

### INQUIRY PERIOD

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In the Episcopal Diocese of Upper South Carolina, we are seeking individuals for ordained leadership who are pastorally gifted, strong teachers, leadership trainers, developers of ministry, and savvy administrators.

When identifying, discerning, forming, and certifying those who are called by Christ and His church for Holy Orders, the following core values, competencies, and norms are to be considered. While it is not expected that individuals possess all of the qualities that are listed in this document, it is important for those in discernment to exemplify a majority of the traits listed below.

### Core Values and Fundamental Competencies

#### Deep Faith in God

- The individual has a passion for God,
- is rooted and confident in their relationship with God, as revealed through Jesus Christ and empowered by the Holy Spirit,
- can articulate an understanding of the world in terms of a relationship between a Creator God and responsive creatures,
- has a grasp of scripture, history, tradition, and theology, and can apply theological concepts to personal and contemporary issues,
- demonstrates spiritual vitality and attends to the need for spiritual disciplines to nourish this vitality, e.g. regular prayer, worship and scripture reading, and
- reflects the hope, joy, strength, and peace of the gospel message.

#### Sense of Call to Ordained Ministry

- The individual displays a maturing understanding of their call to ministry, service, and study,
- demonstrates a commitment to loving service in the church rooted in a sustained and growing love of God in Christ,
- shows evidence of personal and spiritual growth and self-awareness,
- expresses the need and desire to serve God as a disciple of Jesus Christ, already reflected in their exercise of baptismal ministry,
- appreciates that the power inherent in the ministry of Word and Sacrament is a sacred trust,
- demonstrates humility in the exercise of leadership, and understands the differences, as well as the relationship, between lay and ordained ministries, and
- recognizes and accepts that vocation is affirmed and authenticated by members of the Body of Christ.

## Capacity for Leadership

- The individual can articulate the nature of the priestly or diaconal vocation and identity as it has been received within the Anglican tradition,
- can give an account of how their vocation to ministry relates to this understanding,
- demonstrates a readiness to receive and exercise this ministry as a deacon/priest within the Church of God,
- engages in pastoral leadership,
- demonstrates the basic skills necessary to preach effectively in public contexts,
- demonstrates the gifts and capacity to offer pastoral care,
- demonstrates the capacity for effective collaborative leadership and an ability to work in teams in a range of settings,
- has reflected on the different types of ministry and understands the particular ministries to which they are called,
- is aware of a variety of ministry settings, e.g., urban, small town, rural ministries, and has been exposed to at least one context separate from their present one,
- is aware of the public character of theology and able to communicate theologically in the contexts of worship, personal interaction, group-study, and the media,
- discerns God's presence and activity in the lives of others,
- discerns the gifts of others and equips them to lead and to serve,
- demonstrates an awareness of the church's role and opportunities in public life and a capacity to collaborate in a well-informed way with ecumenical partners, other faith communities, and secular agencies,
- understands basic administration including stewardship of resources, prioritization, collaborative working, finance, and accountability,
- demonstrates a growing capacity to assist a congregation in the process of visioning, and
- demonstrates a growing understanding of the theory and practice of mission and evangelism, changing expressions of church life, and their relation to the local context.

## Skills for Teaching and Learning

- The individual demonstrates a growing ability to nurture the faith of others and to draw out their capacities for baptismal ministry and leadership,
- demonstrates a growing ability to teach the Christian tradition,
- shows the capacity to gather, critically assess, integrate, and use insights, information, and ideas in support of the teaching ministry,
- shows a growing awareness of the resources that are available to support ongoing lifelong learning in support of the teaching ministry,
- possesses communication skills, both oral and written, and the ability to communicate with a wide variety of people using various media formats (email, Facebook, phone, written letter) that are clear, engaging and effective,
- shows a developing understanding of how children and adults learn in order to nurture others in faith development, and
- demonstrates faith by word and deed and teaches others to proclaim their faith by word and deed.

## Love of Church

- The individual is committed to the church as the Body of Christ in the world,
- loves the church in its Anglican/Episcopal expression, yet recognizes its constant need for renewal,
- desires to use their particular gifts to enable the church to be all the more faithful,
- understands, affirms, and is willing to minister within the diversity encompassed by the Anglican Church,
- is open to, and aware of, other faith and denominational expressions, while maintaining a confident and unapologetic commitment to the Anglican tradition, and
- appreciates that the priest/deacon is a public figure representing the Church to the local community.



## **Life-long Learner**

- The individual is curious, interested and engaged in life, and is open to personal growth and new ideas,
- is educationally prepared for and intellectually capable of ministry,
- is well-read, culturally alert, and participates in workshops, conferences, and courses for continuing growth and skill development, and
- has a broad range of interests, and is involved in activities outside the church.

## **Vision**

- The individual shows leadership potential and understands this gift as a response to the guidance and will of God,
- can articulate a sense of prophetic vision and direction for the church,
- generates enthusiasm and motivates and inspires others to think strategically and plan for the future,
- appreciates the challenges facing the church, and takes initiative to share the Good News effectively,
- can diagnose and develop strategies for church growth, especially for congregations that are in decline,
- has the courage to name and face evil and darkness without losing the abiding sense of God's presence, and
- can analyze and synthesize disparate elements so that, enabled by the Holy Spirit, something new and productive can happen.

## **Mission**

- The individual recognizes and exhibits concern for the scope of human need both within and beyond the congregation and sees the related possibilities for ministry,
- desires and takes initiative to proclaim the Good News through social justice and evangelism,
- is willing to take the risks associated with making a difference in the church and the world,
- is sensitive to the cultural diversity of ethnic groups to which the congregation will attempt to minister, and
- ministers to all people equitably regardless of race, class, culture, handicap, age, sex, or sexual orientation.

## **Steward of Resources**

- The individual understands the priest/deacon as the steward of a sacred trust which carries obligations to God and the People of God,
- attends to their own emotional, physical, and spiritual well-being, and understands self-care is theologically grounded in the view of the self as a child of God,
- is an effective steward of time and gifts in order to maintain a healthy balance between concern for self, family, vocation, and avocation,
- is attentive to administrative issues so that programs and policies are carried out,
- understands that congregational ministry requires supervision and oversight of staff, volunteers and financial resources, and
- is aware of technological advances that could assist the church to accomplish its mission.





## Norms

### Integrated Personality

- The individual lives, privately and publicly, in such a way that is compatible with a maturing Christian faith within the context of The Episcopal Church,
- demonstrates a healthy and loyal, but not uncritical, relationship to their diocese, province, and national church,
- demonstrates integrity between faith, action, theological reflection, and personal life choices,
- individually lives out the Baptismal Covenant so that people see the congruence between what they profess and their actions,
- acts prudently in relationships and maintains confidentiality,
- demonstrates maturity, stability, and appropriate boundaries; uses humor appropriately,
- is widely trusted and seen as direct and truthful,
- accepts responsibility for their own mistakes, and does not misrepresent facts for personal protection, and
- recognizes their personal need for forgiveness, and is a forgiving person.

### Self-awareness

- The individual reflects with insight on their strengths, weaknesses, gifts, and vulnerabilities,
- discerns God's presence and activity in their own life,
- maintains a sufficiently healthy level of self-esteem to ensure independence and differentiation from those with whom they work, minister, and live,
- lives with ambiguity or paradox, including creative tension that brings about healthy change,
- distinguishes between what can and cannot be changed in personal or congregational life,
- deals with conflict honestly and creatively,
- deals with problems firmly and promptly, and can confront or mediate when appropriate,
- can acknowledge and accept mistakes and failures as part of life, learns from each set-back, and when appropriate, can laugh at their own mistakes, and
- willingly shares their thoughts about personal strengths and limitations.

### Discerner of Gifts

- The individual is committed to empowering and preparing the People of God for their ministries in the church and the world,
- has good judgment about the creativity and talents of others, and can discern, call forth, and nurture their gifts,
- understands how people of all ages learn and develop in faith, and
- appreciates the need for training and support of volunteers.

### Communicator

- The individual exhibits a developing ability to express thoughts and feelings clearly to inform, motivate and/or challenge and persuade,
- desires to transmit the traditions and teachings of the Church,
- is effective in a variety of settings: one-to-one, small and large groups, peers, and
- can manage group process during a presentation and change tactics midstream when something isn't working.

## **Team Player**

- The individual uses a leadership style appropriate to the situation,
- delegates, plans, coordinates, and leads as appropriate,
- can work in groups, share leadership and respect the opinion of others,
- builds a sense of community in groups, allowing other's gifts to come forward,
- works collaboratively and consults with others,
- can discern when to function collegially and when a decision is required, and
- is flexible and adaptable.

## **Compassionate**

- The individual genuinely loves people, showing compassion and concern for all aspects of their lives, and can rejoice with those who rejoice and weep with those who weep,
- is approachable and puts people at ease,
- listens attentively and sensitively to people's spiritual and emotional needs and is aware of what is being communicated, even covertly,
- is sensitive and patient with the interpersonal anxieties of others, and
- helps to promote healing, wholeness, and reconciliation.

## **Acquired Competencies**

*It is critical when identifying and discerning an individual called to Holy Orders that the individual demonstrates the intellectual, emotional, and physical capacity to acquire the following competencies that they will be expected to demonstrate following a period of formation.*

### **Holy Scripture**

- The individual has read and studied the Bible in-depth,
- can interpret select texts from the Bible using appropriate theological, historical, critical, and literary tools,
- understands the significance of the different genres of the materials within the Bible,
- is aware of how the Bible is interpreted through the lenses of gender, socioeconomic, and cultural location,
- engages with the Scriptures and the traditions of Christian thought in faithful obedience and with openness to new insights,
- develops a practice of study and reflection, and a working knowledge of how to interpret and use Scripture in a range of different contexts,
- interprets the Bible in a way that makes it accessible to the community,
- can assist the community to read the Bible in the light of Christian tradition and God-given reason, and
- understands a wide range of theological themes within the canon of Scripture, and is familiar with how these themes relate to the basic creedal doctrine and the teaching of major figures in church history.

### **Theology**

- The individual understands the development of the Christian tradition and how that has been received and interpreted in Anglican thought,
- articulates core Christian doctrines, including their defenses and their critiques, and the particularities of how they have been received within Anglicanism,
- understands the significance of philosophy in the development and apology of the Christian faith,
- is familiar with the writings of several major theologians, including key shapers of the Anglican tradition, and
- can articulate creedal doctrines and how they have been understood within the Anglican tradition.

### **Church History**



- The individual understands the diversity of the Christian tradition, historically and globally,
- understands the significance of the relationship between the Christian faith and its Jewish origins,
- is familiar with Anglican history in colonial America and how it shaped the Episcopal Church,
- is familiar with the history of missions of the Anglican Church globally,
- has an understanding of the Anglican Communion worldwide, its character, history, diversity, challenges, and polity, and
- is familiar with the history of the English Reformation and critical areas of English church history post-Reformation.

### **Contextual Ministry**

- The individual is aware of the challenges and promises facing Christian theology and evangelism in a pluralistic and secular society,
- is familiar with the teachings and practices of partner Christian Churches, particularly those that are encountered in the context of the United States,
- is aware of the teachings and the practices of other faiths, particularly those that are encountered in the United States,
- considers the place of the Christian faith in this new context and its implications for relationship-building with those of other faiths and, for the effective proclamation of the Gospel, and
- demonstrates a capacity to understand how the ministry of a congregation is shaped by and shapes its local context.

### **Liturgy**

- The individual displays an understanding of Anglican spirituality and the centrality of liturgy in Anglican identity and self-understanding in both modern and historical contexts,
- demonstrates a thorough grounding in the authorized worship texts and resources of the Episcopal Church,
- understands the role of liturgy in expressing and forming doctrine and ethics,
- presides or serves effectively and gracefully within worship, as appropriate for the role (priest/deacon),
- preaches the Gospel with faith and passion in a way that reflects an understanding of the role of proclamation within the liturgy,
- understands and participates in worship with a clear sense of the role of the whole people of God, including the particular roles of deacon, priest, and bishop,
- understands the contextual and missional implications of liturgical practice and is familiar with a range of recent developments in the life of the church, e.g. emerging church / missional church, and
- displays an understanding of traditional worship within the Anglican tradition.





## Questions for Sponsoring Priests

The Episcopal Diocese of Upper South Carolina

### INQUIRY PERIOD

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#### ***SPIRITUAL:***

- What are the Inquirer's current ministries?
- What other ministries are suggested by the Inquirer's gifts?
- How does the Inquirer display growth in their Christian faith?
- How clearly does the Inquirer articulate their faith?
- How does the Inquirer's spirituality manifest itself to you?
- How does the Inquirer differentiate between the ministries of the laity and the ordained?
- How well does the Inquirer articulate their call to ministry?
- Could the Inquirer serve the Church more effectively as a layperson or as an ordained person?

#### ***INTELLECTUAL:***

- What is this person's academic background?
- Does the Inquirer have the skills and ability to do the canonically required study and preparation?
- Does the Inquirer demonstrate the ability to reflect upon their personal experiences and to grow from them?
- Does the Inquirer exhibit curiosity?
- Does the Inquirer demonstrate a desire to learn?
- Is there an ability to integrate theological concepts and to transfer them into practical use?

#### ***EMOTIONAL:***

- How does the Inquirer cope with stress?
- How aware is the Inquirer of their feelings?
- How does the Inquirer deal with conflict?
- How does the Inquirer deal with anger?
- How does the Inquirer deal with guilt?
- Is the Inquirer's emotional maturity commensurate with their chronological age?
- How does this person understand their sexuality? Are they comfortable with their own sexual identity?
- Are there traumas in their history? Do they continue to affect the person?
- If the discernment process does not lead to ordination, is the person mature enough to accept this outcome?



**PHYSICAL:**

- Can the Inquirer handle the physical demands of the ministry to which they are or may be called?
- Does the Inquirer take good care of their physical needs?

**PERSONAL/FINANCIAL:**

- What are the Inquirer's family responsibilities?
- Is the Inquirer's family supportive of their ministry?
- How many times has the Inquirer been married? If divorced, what were the circumstances? Has the relationship with the previous spouse been reconciled?
- Is the Inquirer able to relocate to serve wherever the church may need them to serve?
- How will the Inquirer finance their seminary/diaconate education?
- Does the Inquirer have any significant financial obligations which would interfere with their ministry?

**LEADERSHIP:**

- Evaluated against the Core Values and Competencies of "Capacity for Leadership," what are the Inquirer's leadership strengths? Weaknesses?
- Evaluated against the Core Values and Competencies of "Skills for Teaching and Learning," what are the Inquirer's leadership strengths? Weaknesses?
- How does the Inquirer function in interpersonal relationships?
- How has the Inquirer demonstrated the ability to motivate others?
- How effectively does the Inquirer communicate orally? In writing?
- In what ways has the Inquirer demonstrated effective leadership?
- How does the Inquirer deal with authority?
- How does the Inquirer interact in a team/leadership situation?



# Vocational Discernment Program Overview

## The Episcopal Diocese of Upper South Carolina

### INQUIRY PERIOD

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#### **Biblical Engagement Assessment**

The heart of Anglican practice is the Daily Office: a shared practice of daily scripture in the context of prayer, and prayer in the context of a community of those study of His Word. This is the process by which we are formed, as Christians, as Disciples, and most especially as those who are called to Holy Orders. It is the firm expectation of Bishop Waldo and the Commission on Ministry that those who are called to Holy Orders will have been formed deeply by Holy Scripture and prayer. To this end you are invited to join a group – The Community of Biblical Conversation – which have together resolved to celebrate the Daily Office each morning and share together, conversationally, what we find. The hope is that over time the rhythm of the Daily Office prayed well within community will form each aspirant and postulant to be not merely technically competent with Holy Scripture but saturated in its manner of reasoning and exposition.

#### **Vocational Discernment Internship**

The Inquirer will engage in a supervised parish internship in a parish separate from their own where they will immerse themselves in the life of the parish and engage in a specific ministry project. Over the course of six months (February through July) in coordination with the supervising priest and a lay committee, the Inquirer will participate in creating a new ministry or reenergize an existing ministry in coordination with a lay committee and the supervising priest. The ministry project should pertain to the strategic vision of the parish, be reasonable in scope to the time limitations of the internship, be of mutual benefit, demonstrate the Inquirer's leadership skills, and deepen their understanding of God's vocational call in their life. The hope is that by engaging fully in the life of their site parish and reflecting on their ministry experience, the Inquirer will sharpen, affirm, and be able to clearly articulate their call.

#### **Commission on Ministry Mentors**

The call to ministry is a call which is most often first heard by an individual and then confirmed by the larger church. An Inquirer in this process has already had discussions with their parish priest, as well as the Commission on Ministry, and is engaged in a six-month internship in a parish separate from their own. The mentoring that takes place now represents the wider church.

One lay and one ordained person from the diocese will be assigned to the Inquirer. Before the completion of the parish internship, the Inquirer will schedule their course of meetings over the next three months (a minimum of three meetings from June through September) to discuss and explore one's vocational call.

#### **Vocational Discernment Retreats**

The Inquirers will also have an opportunity to attend two vocational discernment retreats. These retreats will offer the Inquirer ways to explore one's vocational call and the realities of seminary and ordained life.



# Formation for Holy Orders

## The Episcopal Diocese of Upper South Carolina

### ORDINATION PROCESS

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Once the Inquirer is granted postulancy by the Bishop the postulant will enter a formal period of formation that will depend upon recommendations from the Board of Examining Chaplains and Commission on Ministry to the Bishop. For example, a postulant for the priesthood would typically enter into seminary. During this formal period of formation, the postulant/candidate/ordinand will have opportunities to connect with the bishop and the diocese throughout the year.

### **Process of assessment for Canonically-mandated ministerial Proficiencies**

#### **(The Portfolio Process and the Seminarian's Retreat)**

The Board of Examining Chaplains of the Episcopal Diocese of Upper South Carolina, at the instruction of our Bishop and with the full support of our Commission of Ministry, has developed a portfolio process as an alternative means of demonstrating proficiency in the canonical areas for ordination. Our vision for the future demonstration of proficiency is founded on the compilation of a portfolio of work submitted over the course of the formal formation.

These submissions are evaluated annually at the January "Seminarian's Retreat." The retreat is attended by all postulants, candidates, and ordinands for Holy Orders of the Diocese, our Bishop, the Commission on Ministry, the Transition Officer, and the Board of Examining Chaplains. Furthermore, the portfolio and the retreat are intended to cultivate a process that is incarnational at its roots, embracing a healthy tension of the evaluative process while also walking with and empowering candidates in their calling.

### **Ember Day Letters**

Every postulant or candidate for Holy Orders in the Episcopal Church is required by canon to report to the bishop four times a year, during Ember Weeks. The report must be made in person or by letter and must include a reflection on the person's academic experience as well as personal and spiritual development.

### **Diocesan Convention**

Every postulant, candidate, and ordinand for Holy Orders is required to attend the Diocesan Convention each fall.



## Discernment Program for Holy Orders Application

### The Episcopal Diocese of Upper South Carolina

Name \_\_\_\_\_  
*(Last)*
*(First)*
*(Middle/Maiden)*

Discerning (circle one) Priesthood Diaconate

**Section I: Personal Data**

Home Address \_\_\_\_\_  
*(Street, Apt #)*  
 \_\_\_\_\_  
*(City, State, Zip)*

Home Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_

Fax \_\_\_\_\_ Other \_\_\_\_\_

Preferred Email Address \_\_\_\_\_

Occupation \_\_\_\_\_

Employment/Retirement: \_\_\_\_\_  
*(Name of business)*  
 \_\_\_\_\_  
*(Street, suite #) (City, State, Zip)*

Business Phone \_\_\_\_\_ Fax \_\_\_\_\_

Date of Birth \_\_\_\_\_ Place of Birth \_\_\_\_\_

Spouse's Name \_\_\_\_\_  
*(If applicable)*

Spouse's date of birth \_\_\_\_\_ Spouse's Occupation \_\_\_\_\_

Children's Names and Ages \_\_\_\_\_

Previous Marriage(s): If applicable, list name of spouse, wedding date, divorce date



Congregation \_\_\_\_\_

Congregation Address \_\_\_\_\_

Congregation Phone \_\_\_\_\_ Fax \_\_\_\_\_

Priest \_\_\_\_\_ Cell \_\_\_\_\_

Length of Time \_\_\_\_\_  
*At above congregation                      In the Diocese of Upper South Carolina                      In the Episcopal Church*

**Section II: Canonical Status**

Date of Baptism \_\_\_\_\_ Denomination \_\_\_\_\_

Name of Church \_\_\_\_\_ City/State \_\_\_\_\_

Date confirmed/received into the Episcopal Church \_\_\_\_\_

Name of Church \_\_\_\_\_ City/State \_\_\_\_\_

Religious Background (if not Episcopal/Anglican) \_\_\_\_\_

**Section III: Education**

High School Diploma – City/State/School Year

\_\_\_\_\_

Technical/Vocational/Special Education – School/Type of Training or Degree/Certification Year

\_\_\_\_\_

\_\_\_\_\_

Undergraduate/Graduate (start with most recent) – School/ Major with areas of specialization/ Degree Year

\_\_\_\_\_

\_\_\_\_\_

Current and Previous Theological Education – School/ Major with areas of specialization/ Degree Year

Please describe any previous seminary study, or diocesan, parish, or extension programs. If you wish to submit prior study experience for consideration of transfer credit, an official transcript must be submitted.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Section IV: Previous Ordination History (If applicable)**

Have you previously applied for Holy Orders? If yes, please give details, including dates and diocese

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Ordination in another denomination?      Yes      No

If yes, have orders been resigned?      Yes      No (If yes, include a copy of official resignation.)

If yes, please give details including years of service: \_\_\_\_\_

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### **Section V: Work History**

Attach resume with name, addresses, and dates of previous work experience

### **Section VI: Personal Narrative Prompts**

Please answer the following short essay (approx. 400-500 words, or 1 to 2 pages recommended) questions on a separate document:

1. Give an account of your personal history including family origin and dynamics, church ministry involvement, and spiritual development.
2. Describe your perception of vocation and/or how your perception has evolved as well as any expectations you have regarding your personal ministry moving forward.
3. Building from the narrative responses given, how do you believe ordination will allow you to live into your ministry more fully?

### **Section VII: Reference Letters**

Please include letters from your Sponsoring Priest and current senior warden, which answer the following questions. These letters should be sealed and returned with the application or separately.

1. Please describe your sense of the inquirer's call to Holy Orders?
2. How does this person's life show a commitment to following Jesus Christ?
3. How does this person's life reflect the Christian disciplines of prayer and worship and the particular practices of the Episcopal Church?
4. How would you describe this person's style of leadership? How does this person empower others to serve?
5. (Sponsoring Clergy only): From your experience of the inquirer and from your subsequent discernment conversations, please describe the inquirer's sense of call to Holy Orders.

### **Section VIII: Financial**

Check Applicable Items:

1. I have adequate financial resources. \_\_\_\_\_
2. My parish will be helping with expenses. \_\_\_\_\_
3. May need financial assistance. \_\_\_\_\_

**Section IX: Other Documentation**

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Submit with Application:

- Baseline Criminal Check
- Credit Report
- Medical Evaluation
- Psychological Assessment
- Authorization to Release Information

**Section X: Applicant's Signature**

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I have discussed the information contained in following documents with my Sponsoring Priest, as well as any relevant information that might be disclosed by more thorough checks in the areas of Personal Background Information, Physical and Mental Health, and Financial Health. I also acknowledge that upon admission to the formal discernment process, I will be held financially responsible for certain canonically required materials, such as a comprehensive background check. The information presented in this application and my signature below signifies my desire to participate fully in the Vocational Discernment Process in the Diocese of Upper South Carolina.

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Applicant's Signature

Date

**Section XI: What to do to complete your application**

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Return completed form to The Rev. Canon Jimmy Hartley  
The Episcopal Diocese of Upper South Carolina  
Discernment Program for Holy Orders  
1115 Marion Street  
Columbia, SC 29201-3706  
Phone: (803) 771-7800

**For Release of Information to Diocese**

**AUTHORIZATION TO RELEASE INFORMATION, RELEASE OF CLAIMS AND  
INDEMNITY AND HOLD HARMLESS AGREEMENT**

**(referred to herein as “Authorization and Release”)**

Name of Applicant:

Social Security Number:

Permanent Address of Applicant:

Current Address of Applicant if Different from Above:

Telephone Numbers:

Today's Date:

1. I am voluntarily seeking to become or am presently a candidate for postulancy, ordination, and/or other ministry position (referred to herein as my “application”) in The Episcopal Church through a process conducted by the Diocese of Upper South Carolina. I understand that as a part of the Diocese's decision-making process about my application, I am required to undergo a psychiatric and/or psychological assessment ("Assessment") by a person or persons selected or approved by the Diocese.

2. I understand that the Assessment is only one part of the Diocese's decision making process and that information provided to the Diocese about the Assessment may be considered with other information available to the Diocese in deciding whether or not to accept me or to continue considering my application for postulancy, ordination and/or other ministry position in the Diocese. Nonetheless, I understand that information from the Assessment may be determinative of the Diocese's decision.

3. I voluntarily consent to participate in the Assessment and I agree to cooperate fully with the Assessment. I understand that the Assessment may include one or more attitude questionnaires, psychological tests, psychiatric tests, and/or clinical interviews. I understand that I will be asked to provide various types of information about myself which may include but not be limited to, information about my family, medical history, psychological and psychiatric history, criminal history, sexual behavior and attitudes, drug and alcohol use, relationships, education, and employment. I agree that all the information I provide for the Assessment will be true, correct, and complete, to the best of my knowledge. I understand that false or misleading statements made by me or significant omissions of any kind in the Assessment process are sufficient cause for dismissal from the application process or denial of my application for a ministry position in the Diocese.

4. I authorize all mental health professionals involved in the Assessment to disclose to each other, both orally and in writing, all records and information, including opinions, pertaining to the Assessment, including but not limited to my responses to any questionnaires, tests and interview questions.

\_\_\_\_\_ Initialed by Applicant

5. I understand that at the conclusion of the Assessment, a written report may be prepared that will contain conclusions, opinions, observations, recommendations for follow-up, and the like. I authorize the mental health professionals involved in the Assessment to disclose the written Assessment report to the Bishop or Ecclesiastical Authority of the Diocese. I authorize the Bishop or Ecclesiastical Authority to disclose to and discuss the written Assessment report with those involved in the application process. I authorize the mental health professionals involved in the Assessment to discuss the written Assessment report with the Bishop or Ecclesiastical Authority and those involved in the application process.

6. I understand and agree that whether or not I have paid for the Assessment or any part thereof, all of the records and documents related to the Assessment do not belong to me and I do not have the right to see them, have them reviewed by or sent to anyone else, or to receive a copy of them at any time. I further understand and agree that I am not entitled to discuss the Assessment with the personnel involved in the Assessment process nor am I entitled to have anyone else discuss the Assessment with them on my behalf. I agree that I will not request or seek to obtain from the Bishop or Ecclesiastical Authority or Diocese or any of the personnel involved in the Assessment or any other person or entity the originals or any copies of any records or documents related to the Assessment, nor will I authorize anyone to do so on my behalf.

7. I understand that after the Assessment described herein, the Diocese may determine that further assessment is necessary before a decision is made on my application. If I elect to participate in such further assessment, all the terms of this Authorization and Release shall apply to any further assessment.

8. I understand and agree that the Diocese will have the right to control the use and disclosure of information regarding the Assessment both during consideration of my application and after consideration of my application has terminated, regardless of the action taken on my application, and that the Diocese does not have to obtain any further authorization from me to disclose any information regarding the Assessment or the written Assessment report.

9. I consent to the use of information that I provide or that is developed from the Assessment for research purposes, including but not limited to publication and presentation to the scientific or religious communities and/or other audiences, provided that if so used, the information will be presented in a disguised format to preclude identification of my identity.

10. As consideration for having my application considered by the Diocese, I hereby waive, release and discharge the Diocese and its officers, directors, employees, volunteers, agents and legal representatives, and all personnel and entities involved in conducting the Assessment and their officers, directors, employees, volunteers, agents, heirs, administrators, successors, assigns and legal representatives ("the Released Parties") from liability of all kinds including but not limited to personal injury, defamation, slander, libel, negligence, invasion of privacy, breach of contract, or otherwise, in law or in equity, arising out of my participation in the Assessment, use or disclosure of information regarding the Assessment, or arising in any other way as a result of the Assessment. I do not release the Released Parties from liability for willful or intentional acts or punitive damages.

\_\_\_\_\_ Initialed by Applicant

11. I also agree not to sue or make a claim against the Released Parties for injury, damage, or loss of any kind sustained as a result of my participation in Assessment, the use or disclosure of information regarding the Assessment, or relating in any way to the Assessment. I will indemnify and hold harmless the Released Parties from all claims, judgments, and costs, including attorneys' fees, incurred in connection with any such action.

12. I agree that if any portion of this Authorization and Release is found by a court to be unenforceable for any reason, the remainder of this Authorization and Release shall remain valid and in full force and effect.

13. I have carefully read this authorization and release and fully understand its contents. I sign it of my own free will. I understand that I may consult with an attorney of my choice before signing this document. I acknowledge that I have had the opportunity to ask questions concerning the contents of Authorization and Release and any such questions have been answered to my satisfaction. Nonetheless, in agreeing to sign this Authorization and Release, I have not relied upon any statements or explanations made by any of the Released Parties or by any attorney of any of the Released Parties. I have initialed each page of this Authorization and Release indicating that I have read and understood each paragraph.

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(Applicant's Signature) Date

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(Print or type Applicant's name)

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(Witness' Signature)

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(Print or type Witness' Name)

\_\_\_\_\_ Initialed by Applicant



# Application Requirements for Holy Orders Process

## The Episcopal Diocese of Upper South Carolina

ORDINATION PROCESS

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NAME: \_\_\_\_\_

CONGREGATION: \_\_\_\_\_

**Application for Discernment Program for Holy Orders:** *Documents listed below must be submitted with Application Form for Application for Discernment by December 1 unless otherwise noted.*

- \_\_\_\_\_ Application for Discernment Program (Sections I – IV)
- \_\_\_\_\_ Copies of Baptism and Confirmation certificates (Section II)
- \_\_\_\_\_ Copies of official transcripts for applicable levels of education (Section III)
- \_\_\_\_\_ Resume or Work History (Section V)
- \_\_\_\_\_ Personal Narrative Essay Responses (Section VI)
- \_\_\_\_\_ Life History Questionnaire (form provided on website)
- \_\_\_\_\_ Sponsoring Priest Recommendation (Section VII)
- \_\_\_\_\_ Senior Warden Recommendation (Section VII)
- \_\_\_\_\_ Financial Worksheet (Section VIII; form provided on website)
- \_\_\_\_\_ Other Documentation (Section IX)
  - \_\_\_\_\_ Baseline Criminal Report (SLED and/or Criminal CBS)
  - \_\_\_\_\_ Credit Report
  - \_\_\_\_\_ Medical Evaluation
  - \_\_\_\_\_ Copy of Behavior Screening Questionnaire (form provided on website)
  - \_\_\_\_\_ Psychological Examination (**Complete by November 1**)
  - \_\_\_\_\_ Authorization to Release Information to the Diocese

**Application for Postulancy:** *To be completed during the Diocesan Vocation and Discernment Program. Materials due September 15 of the year preceding enrollment in Seminary (Priesthood) or Diocesan Formation Program (Diaconate)*

- \_\_\_\_\_ The congregation provides a letter supporting a nomination for Holy Orders to include:
  - \_\_\_\_\_ Pledge from the congregation to contribute financially to the nominee’s preparation and process of involvement in the preparation for ordination
  - \_\_\_\_\_ Letter to be signed by two-thirds of the vestry and the Sponsoring Priest
- \_\_\_\_\_ Inquirer submits Acceptance of Nomination for Holy Orders to the Bishop including:
  - \_\_\_\_\_ A picture for their file
  - \_\_\_\_\_ Full name and date of birth
  - \_\_\_\_\_ The length of time resident in the Diocese
  - \_\_\_\_\_ A statement indicating whether an application for postulancy has been made previously or in any other diocese
  - \_\_\_\_\_ A description of the process of discernment by which the nominee has been identified for ordination
- \_\_\_\_\_ Copy of Medical Evaluation
- \_\_\_\_\_ Copy of Psychological Examination
- \_\_\_\_\_ Oxford Document Management Background Check (initiated through the Bishop’s Office)
- \_\_\_\_\_ Biblical Engagement Assessment

\_\_\_\_\_ Internship Covenant:

\_\_\_\_\_ Midterm Evaluation by Supervising Priest

\_\_\_\_\_ Midterm Evaluation by Applicant

\_\_\_\_\_ Final Evaluation by Supervising Priest

\_\_\_\_\_ Final Evaluation by Applicant

\_\_\_\_\_ 3 Mentor reports (either submitted jointly or 3 reports from each of the 2 mentors)

\_\_\_\_\_ The Commission on Ministry evaluation of the nominee's qualifications (for the Bishop)

\_\_\_\_\_ If granted postulancy, the postulant will communicate with the Bishop by letter four times  
\_\_\_\_\_ a year during the Ember Weeks, reflecting on the Postulant's academic experience and  
\_\_\_\_\_ personal and spiritual development throughout the discernment/ordination process

**Application for Candidacy:** *To be completed during Year 2 of Formation. Materials are due April 1 during the spring semester. Candidacy interviews with the Standing Committee will be scheduled in June of the same year. An email with interview details will be sent to all who have completed applications by April 1.*

\_\_\_\_\_ Postulant submits an application to the Bishop expressing a desire for consideration as a  
\_\_\_\_\_ Candidate for Ordination

\_\_\_\_\_ Postulant provides a copy of their Certification of Postulancy

\_\_\_\_\_ Postulant's congregation provides a letter supporting candidacy signed by two-thirds of  
\_\_\_\_\_ the vestry and the Sponsoring Priest

\_\_\_\_\_ Postulant's seminary provides a recommendation for candidacy  
\_\_\_\_\_ (on seminary letterhead & w/ signature)

\_\_\_\_\_ Seminary provides transcripts to date (need transcripts through last semester)

\_\_\_\_\_ Postulant provides CPE evaluation

\_\_\_\_\_ Postulant provides all field placement evaluations

\_\_\_\_\_ Commission on Ministry provides a statement attesting to the continued formation, along  
\_\_\_\_\_ with all mentor evaluations

\_\_\_\_\_ Standing Committee submits approval to the Bishop after interviewing the postulant

**Process for Ordination to the Transitional Diaconate:** *To be completed during Year 3 of Formation. All materials are due by February 15.*

\_\_\_\_\_ Candidate submits an application to the Bishop requesting ordination to the (transitional)  
\_\_\_\_\_ diaconate

\_\_\_\_\_ Candidate provides a copy of their certifications for postulancy and candidacy

\_\_\_\_\_ The candidate provides the following training certifications:

\_\_\_\_\_ Prevention of sexual misconduct and civil requirements for reporting and  
\_\_\_\_\_ pastoral opportunities for responding to evidence of abuse

\_\_\_\_\_ The Constitution and Canons of the Episcopal Church, Title IV

\_\_\_\_\_ The Church's teachings on racism

\_\_\_\_\_ Candidate's congregation provides a letter supporting their application for ordination  
\_\_\_\_\_ signed by two-thirds of the vestry and the Sponsoring Priest

\_\_\_\_\_ Seminary (or another program of preparation) provides a certificate showing the  
\_\_\_\_\_ candidate's scholastic record in the subjects required by the canons and an evaluation  
\_\_\_\_\_ with other recommendations as to the candidate's qualifications for ordination to the  
\_\_\_\_\_ (transitional) diaconate

\_\_\_\_\_ The Examining Chaplains provide a certificate to the Commission on Ministry regarding  
\_\_\_\_\_ proficiency in the canonically required areas of study

\_\_\_\_\_ The Commission on Ministry provides a recommendation regarding ordination to the  
\_\_\_\_\_ (transitional) diaconate

\_\_\_\_\_ The Standing Committee will certify that the canonical requirements for ordination have  
\_\_\_\_\_ been met and that there is no sufficient objection on medical, psychological, moral, or  
\_\_\_\_\_ spiritual grounds (Form provided)

\_\_\_\_\_ The Canon for Christian Formation, Congregational Vitality, and Missional Communities  
\_\_\_\_\_ will certify that the following requirements have been completed within **thirty-six months**  
\_\_\_\_\_ before ordination:

\_\_\_\_\_ Background Check



\_\_\_\_\_ Medical evaluation  
\_\_\_\_\_ Psychological examination

**Transitional Deacons Process for Ordination to Priesthood** – *To be completed during the first six months after being ordained to the diaconate. All materials are due by August 31.*

- \_\_\_\_\_ Transitional Deacon submits an application to the Bishop requesting ordination to the priesthood
- \_\_\_\_\_ Candidate provides a copy of their certifications for postulancy, candidacy, and ordination to the diaconate
- \_\_\_\_\_ Candidate's congregation provides a letter supporting the application for ordination to the Priesthood signed by two-thirds of the vestry and the supervising priest
- \_\_\_\_\_ Seminary (or another program of preparation) provides a certificate showing the candidate's scholastic record in the subjects required by the canons (final transcripts) and evaluation with other recommendations as to the candidate's qualifications for ordination to the priesthood
- \_\_\_\_\_ The Examining Chaplains provide a certificate to the Commission on Ministry regarding proficiency in the canonically required areas of study
- \_\_\_\_\_ The Commission on Ministry provides a recommendation regarding ordination to the (transitional) diaconate
- \_\_\_\_\_ The Standing Committee will certify that the canonical requirements for ordination have been met and that there is no sufficient objection on medical, psychological, moral, or spiritual grounds (Form provided)
- \_\_\_\_\_ The Canon for Christian Formation, Congregational Vitality, and Missional Communities will certify that the following requirements have been completed within **thirty-six months** before ordination:
  - \_\_\_\_\_ Background Check
  - \_\_\_\_\_ Medical evaluation
  - \_\_\_\_\_ Psychological examination