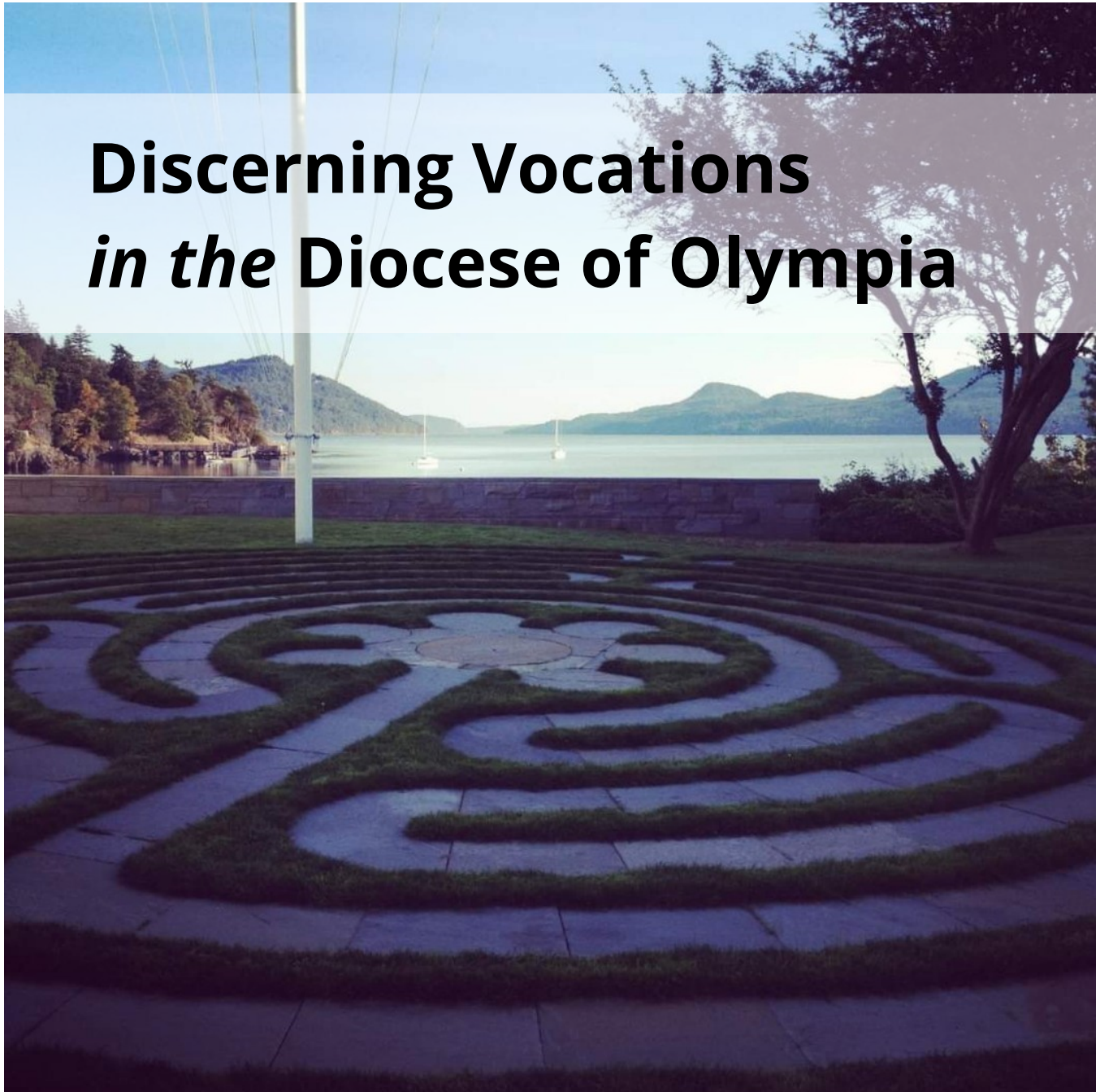


Discerning Vocations *in the* Diocese of Olympia



The Episcopal Diocese of Olympia
Commission on Ministry
vocations@ecww.org



Table of Contents

<i>Letter from Bishop Rickel</i>	3
<i>Points of Contact</i>	4
<i>First Things First: Ministry of the Baptized</i>	5
Process for Discerning Baptismal Ministry	7
Discerning Vocations in the Diocese of Olympia – Essential Elements of Mutual Discernment	7
Resources	8
Documents and Resources of the Episcopal Church and the Diocese of Olympia	9
Other Online and Published Resources	9
<i>Expectations for Ordained Leaders in the Diocese of Olympia</i>	11
<i>Discerning Vocations Manual: Guide and Expectations</i>	13
<i>Phase 1: Learning Assessment for a Discerner Guided by the Clergy Leader</i>	15
Norms and Expectations for Discerners in the Diocese of Olympia	16
<i>Phase 2: Discerning for Holy Orders</i>	18
<i>Applying for Postulancy / The Diocesan Process Towards Ordinations</i>	20
Minimum Requirements for Discernment	20
Overview of Phase 2 Discernment Process	21
Steps in the Discernment Process	22
<i>Discerning Vocations Manual: Curriculum and Session Guide</i>	24
Outline of Discernment Modules	25
General Outline for Meetings	25
Module One: Orientation, Introductions, and Organizing of the Group	26
Module Two: Spiritual Timelines	26
Module Three: The Five Expectations and the Discerner’s Journey	26
Module Four: Spouse, Partners, and Household	26
Module Five: Alcohol, Substance Abuse, and Addiction	27
Module Six: Ordained Life	28
Module Seven: Spiritual Grounding and Christ-centeredness	28
Module Eight: Gifts of Gathering and Developing Community	28
Module Nine: Christian Stewardship	29
Module Ten: Emotional Maturity	29
Module Eleven: Understand Authority	30
Module Twelve: Healthy Boundaries for Clergy	30
Conclusions and Preparation of the Committee’s Report to the Priest and Vestry	30
<i>Appendix A: Expectations for Ordained Leaders in the Diocese of Olympia</i>	31
<i>Appendix B: Holy Orders Assessment Tool</i>	33
<i>Appendix C: Norms and Expectations for Discerners in the Diocese of Olympia</i>	37
<i>Appendix D: Healthy Boundaries for Clergy – Scenarios for Clergy in Congregations</i>	38
<i>Appendix E: Healthy Boundary Issues for Deacons – Scenarios for Deacons</i>	41
<i>Appendix F: Sample Report of the Phase 2 Discernment Committee to the Rector and Vestry</i>	44
<i>Appendix G: Sample Form for Rector and Vestry Nomination for Postulancy</i>	45
<i>Appendix H: Checklist for Nomination to Postulancy</i>	46
<i>Appendix I: Discernment Glossary</i>	47

Letter from Bishop Rickel

Dear Ones,

I am delighted to present this Discernment Guide for the Diocese of Olympia. Our hope is to have one concise document which will help guide congregations, clergy, and individuals in the discernment process for both lay and ordained ministries. We know that this process can cause anxiety and hope this document will serve to alleviate at least some of that. We see this document as a “living” one, which means it is not cast in stone. It will evolve as we live with it, and into it, and we see that as a good thing.

Several things I want to highlight. First, in the past we have had an ethos of not focusing on spouses/partners as much as I feel should be the case. So, you will see this addition in this document. While it is true that the spouse/partner is not being called, it is as equally true that the choice being made by the one they love will change their life. The vows they made to one another came first, and to me, are more important than the new call. I see part of the discernment of the community, and me as Bishop, looking carefully at this reality.

We also present this with the understanding, and hope, that congregations might invite other congregations in their area to share in the discernment journey. As long as you follow the expectations and curriculum included, this can be done in many contexts.

There are some situations we believe this document does not fully address, if at all, and we want to be clear about that. This document was written with the focus on persons discerning their initial call to orders. Some examples of situations this document does not address are Total Common Ministry (TCM), reception of orders from other denominations, and chaplaincy. Certainly, this document can be used as a resource in those situations but for now these mentioned above are either following another process altogether, or are contextual to each specific case. If any questions arise you can contact the Secretary for Vocations.

As we see it, this guide is just that. It is not policy; it is a curriculum and a set of expectations the Commission on Ministry (COM) and I have of those in the process. While we do expect it to be followed, we are also open to listening to proposed variations. I should be clear that such variations should be approved by this office before you deviate from this guide.

Finally, we want your input as you work with this guide. We want it to be helpful to all concerned and not onerous. We hardly believe it is perfect, but we do hope it is a step in the direction of clarity and consistency of process and expectation. So many good people have put long hours into this document, and I want to thank them. May I also suggest that prayer saturate every step outlined here knowing that the Holy Spirit will ultimately guide us in the way we should go.

Blessings,



The Rt. Rev. Gregory H. Rickel
Bishop of Olympia & Chief Steward

Points of Contact

Office of the Bishop

The Office of the Bishop stands ready to serve you and answer any questions you may have about Discernment in the Diocese of Olympia. The Office of the Bishop staff will be glad to answer any questions you have or direct your inquiry to the appropriate contact.

acaballero@ecww.org

206-325-4200

Secretary for Vocations

The Secretary for Vocations supports the Bishop and the Commission on Ministry (COM) and is the primary resource for discerners, clergy, and those in the process toward ordination. They also serve as the Recorder for Ordinations with the Church Pension Group.

April Caballero

vocations@ecww.org

206-325-4200 x.2010

Canon to the Ordinary

The Canon to the Ordinary serves on the COM and alongside the Bishop. The Canon the Ordinary is a point of contact for postulants and candidates in their formation and call process.

The Rev. Canon Arienne Davison

adavison@ecww.org

205-325-4200 x. 2040

Chair, Commission on Ministry (COM)

In addition to convening the COM throughout the year, the COM Chair advises the Priest and Discerner in the design and intent of *Phase 2* Discernment in this Diocese.

The Very Rev. Steven L. Thomason

sthomason@ecww.org

206-323-0300

Commission on Ministry (COM) Liaison

Discerners are appointed a liaison from the COM. If you are in Phase 2 Discernment and have not yet been appointed a liaison, contact the Secretary for Vocations.

FIRST THINGS FIRST: MINISTRY OF THE BAPTIZED



First Things First: Ministry of the Baptized

It is expected that any person discerning ministry as an ordained person in this diocese will have undertaken the important work of discerning their baptismal ministries. While this work can be done concurrently with Phase 1 Discernment, at the invitation and direction of the clergy leader, participation in a mutual discernment group focusing on expressions of ministry other than ordained ministry is a prerequisite to formal discernment for ordained ministry in this diocese. The following material — *Mutual Discernment: Living Into Our Baptismal Covenant*—is intended as a guide for this important work.

Mutual Discernment: Living into Our Baptismal Covenant

“Holy baptism is the sacrament by which God adopts us as his children and makes us members of Christ’s body, the church, and inheritors of the kingdom of god” - BCP, p.858

Title III CANON 1: Of the Ministry of All Baptized Persons

Sec. 1. Each Diocese shall make provision for the affirmation and development of the ministry of all baptized persons, including:

- (a)** Assistance in understanding that all baptized persons are called to minister in Christ’s name, to identify their gifts with the help of the Church and to serve Christ’s mission at all times and in all places.
- (b)** Assistance in understanding that all baptized persons are called to sustain their ministries through commitment to life-long Christian formation.

As Christians we are members of the Body of Christ and our Christian life and witness compels us to be people engaged in worship, service, and action. As Episcopalians, the basis of our ministry can be found in our Baptismal Covenant. In order to live fully into our baptismal ministry, it can be helpful to meet in community and take a deeper and more intentional look at different aspects of our understanding of ministry and the priesthood of all believers.

Our Baptismal Covenant asks us our beliefs and then asks our actions/responses to how we will live our lives (See Baptismal Covenant, BCP; pp.304-305).

Throughout our lives we have the opportunity and responsibility to discern our gifts and God’s call for us to use those gifts in service. *Mutual Discernment: Living into Our Baptismal Covenant* is typically done in community, and everyone in the group is engaging questions of discernment; for example, members of the group may be discerning questions regarding work/vocational life; family, spiritual and/or situational changes, or specific questions related to a particular ministry in their community of faith. A mutual ministry group should include people in various stages of their lives who are discerning various questions.

Our ministries include more than what we do to support our parish life or than the ways we volunteer our time in good works. in our community They also include the ways we are in relationship with God, our family, our friends, our vocation, etc. Our ministries are for all of God’s people and all kinds of ministries are equally valuable to God’s Kingdom (I Cor. 12).

Mutual Discernment: Living into Our Baptismal Covenant is designed for all members of a community; not just for members discerning Holy Orders. *Mutual Discernment: Living into Our Baptismal Covenant* is for all the Baptized. By listening to others' stories and life experiences, we can more fully share our lives as Christ's Body. As each Mutual Discernment community (congregation; small or regional groups) will have its own unique style and rhythm, the timeframes may vary but the over-all process, which will be framed below, will involve key steps. Discernment for ministry is an on-going and life-long process. There should be no "I've already checked that box" and a true understanding of embracing the gifts of the Holy Spirit and continued reflection on our service and ministry.

Process for Discerning Baptismal Ministry

Congregational Participation:

"Where two or three are gathered in my name, I am among them." (Matthew 18:20).

Call to Baptismal Ministry:

Proclaim the Good News in Christ; Seek and serve Christ in all persons; Love your neighbor as yourself; Strive for justice and peace; Respect the dignity of every human being (BCP p.304-305).



Discernment and Formation For All:

"We are living members of the body of Christ, each individually gifted by the Holy Spirit; each called to our own vocation. And now, God, send us out to do the work that you have given us to do, to love and serve you." (BCP p.306).

Development of Ministries:

Call to Congregational Ministries (Licensed and Unlicensed);
Call to Missional Lay Ministries & Call to Ordained Ministries.

Discerning Vocations in the Diocese of Olympia – Essential Elements of Mutual Discernment

Characteristics of Discernment:

- Discernment is a prayerful, intentional process.
- Discernment is a destination.
- Discernment takes place over time (may be 9 months or more).
- Discernment requires trying things out.
- Discernment is an essential element as we seek the will of God in our lives.
- Discernment takes place in community, with every member discerning about their own life.
- Discernment is focused on the ministry of the baptized in a group context; not just one person.
- Discernment occurs at different points in our lives. Opportune times for discernment are times of transition. (change in vocation or areas of ministry; life changes such as relocation, retirement, death of partner/spouse, marriage, etc.), or any time a baptized person wants to explore their baptismal ministry.

While engaged in the *Mutual Discernment: Living into Our Baptismal Covenant* group, a baptized person will:

- Understand their goals and passions and how they are lived out in community,
- Tell their stories,
- Hear others' stories,
- Enlist others in the community to pray and ask questions to guide their ongoing discernment,
- Identify spiritual gifts,
- Be truthful about themselves and with others,
- Be willing to ask and be asked difficult questions,
- Be committed to confidentiality,
- Use tools to help them understand themselves and their role in group dynamics,
- Write about their area of discernment, including their own questions and share these with other group member so that they have time to pray and reflect before meeting together.

Resources

The resources below focus on many aspects of personal, community as well as spiritual tools to assist Mutual Discernment groups answer two fundamental questions: *Who Are We?* *Who Are We in Christ?*

Who Are We?

Self-awareness is a key ingredient for individuals, as well as local faith communities, as we discern God's call to us as the Body of Christ working in the world today.

- Myers Briggs Personality Survey:
 - <https://www.cdcollege.org/2014/10/23/myers-briggs-typology-indicator/>
 - <https://www.verywellmind.com/the-myers-briggs-type-indicator-2795583>
- Inter-Cultural Competency:
 - <https://www.cdcollege.org/consulting-network/what-we-offer/intercultural-competency-training/>
 - <https://idiinventory.com/>
- Diocese of Olympia College for Congregational Development: <https://www.cdcollege.org/>



Who Are We in Christ?

God calls people in the Church to numerous roles and servant ministries, of which only three are ordained ministries (Deacon, Priest, and Bishop). Discernment in community may lead to clarifying, deepening, or strengthening an individual's ministry as part of the Laity.

What are some of these servant ministries? Vestry member or Warden; Altar Guild; Musician; Church School teacher; Outreach; Lay Eucharistic Minister; Buildings and Grounds; Acolytes; Healing Minister; Spiritual Director; etc. The COM recognizes that there are many ministries and that certain ministries, per the Canons of The Episcopal Church (Title III.4) within congregations and other communities of faith will be licensed by the Ecclesiastical Authority (clergy recommendations to the Bishop). The following are some, but certainly not all, available resources for enrichment and training for these ministries:

- Spiritual and pastoral discussions with clergy;
- Work with a Spiritual Director;
- Educational offerings and spiritual formation opportunities offered by the Office of the Bishop and/or local congregations;
- Diocese of Olympia Faith Formation: <https://ecww.org/faith-formation/>
- Education for Ministry (EFM) is a 4 year program of study of scripture, liturgy and Church history, theological reflection, and spiritual growth developed by the School of Theology at the University of the South at Sewanee and is offered by several parishes in the Diocese: <http://efm.sewanee.edu/>;
- Come and See (Cursillo): (<http://www.olykursillo.org/>) and other spiritual groups;
 - Membership in Anglican Fellowship of Prayer: <https://episcopalchurch.org/library/link/anglican-fellowship-prayer>
 - Daughters of the King: <https://www.doknational.org/>
 - Little Sisters of St. Clare: <https://stclarelittlesisters.org/>
 - Franciscan Orders: <https://en.wikipedia.org/wiki/Franciscans>
 - "Religious Orders and Faith Communities" | Episcopal Church," <https://episcopalchurch.org/religious-orders-and-faith-communities-0>
- Books, Videos and Other Resources: Diocesan Resource Center: <https://books.ecww.org/>

Documents and Resources of the Episcopal Church and the Diocese of Olympia

This is an initial list. As you find and use other tools and resources, please refer them to the Diocese of Olympia, so that they may be added here.

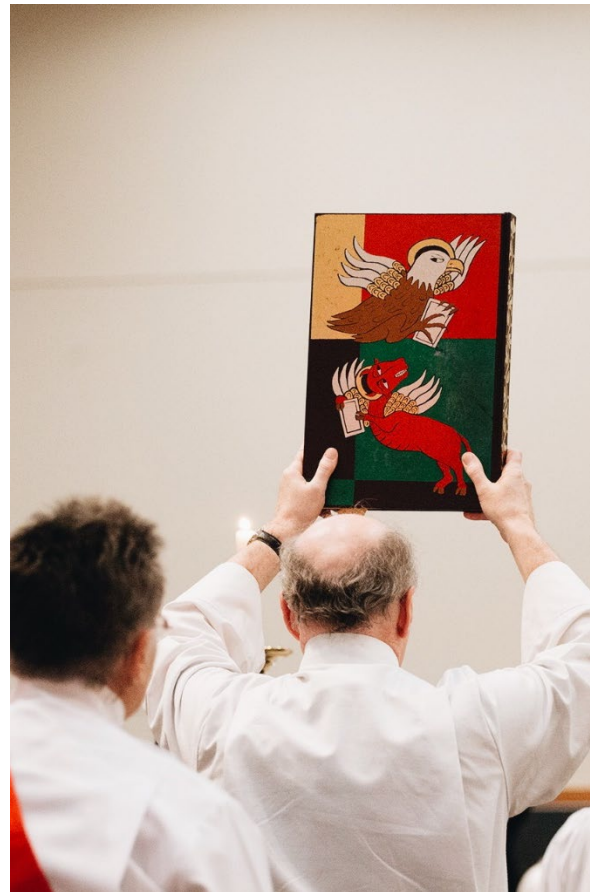
- The Book of Common Prayer (BCP). Church Publishing Co., NY, 1979.
 - The Baptismal Covenant, pp. 305-305.
 - Examination of a Bishop, pp. 517-519
 - Examination of a Priest, pp. 531-532
 - Examination of a Deacon, pp. 543-544
 - An Outline of the Faith, or Catechism, pp. 845-862
- The Iona School: <https://iona.dioceseofolympia.org/>
- The Episcopal Church (TEC)
 - Constitution and Canons, 2018 (or most current), Canons, Title III: <https://www.generalconvention.org/publications#CandC>
- Diocese of Olympia
 - Constitution and Canons, 2019 (or most current), Canons, Canon XIV: <https://resources.ecww.org/constitution-and-canons>
 - April Caballero, Executive Assistant to the Office of the Bishop & Secretary for Vocations: acaballero@ecww.org or (206) 325-4200 x.2010

Other Online and Published Resources

- David G. Benna, *The Gift of Being Yourself: The Sacred Call to Self-Discovery*. Downers Grove, IL: Varsity Press. 2015.

- Congress of Anglican Religions Orders of the Americas (CAROA). *A Handbook of Guidelines*. www.caroa.net.
- L. William Countryman, *Living on the Border of the Holy: Renewing the Priesthood of All*. Harrisburg, PA: Morehouse Publishing. 1999.
- Suzanne Watson Epting, *Unexpected Consequences: The Diaconate Renewed*. NY: Morehouse Publishing. 2015.
- Suzanne G. Farnham, Joseph P. Gill, R. Taylor McLean, & Susan Ward., *Listening Hearts: Discerning Your Call in Community, 20th Anniversary Edition*. Harrisburg, PA: Morehouse Publishing. 2004.
- Suzanne G. Farnham, Joseph P. Gill, R. Taylor McLean, & Susan Ward, *Listening Hearts: Manual for Discussion Leaders*. Harrisburg, PA: Morehouse Publishing. 1993. 8
- Suzanne G. Farnham, Joseph P. Gill, R. Taylor McLean, & Susan Ward, *Grounded in God Revised Edition: Listening Hearts Discernment for Group Deliberations*. Harrisburg, PA: Morehouse Publishing. 1999.
- Albert Haase, *Saying Yes: Discovering and Responding to God's Will in Your Life*. Brewster, MA: Paraclete Press. 2016.
- Sue Annis Hammond, *The Thin Book of Appreciative Inquiry (3rd ed.)*. Bend, OR: Thin Book Publishing Co. 2013.
- Elizabeth Liebert, *The Way of Discernment: Spiritual Practices for Decision Making*. Louisville: Westminster John Knox Press. 2008.
- Nancy Ann McLaughlin, *Do You Believe? Living the Baptismal Covenant*. NY: Morehouse Publishing. 2006.
- Wayne Muller, *How, Then, Shall We Live? Four Simple Questions that Reveal the Beauty and Meaning of Our Lives*. NY: Bantam Books. 1997.
- National Association of Episcopal Christian Communities (NAECC). www.naecc.us.
- John Neafsey, *A Sacred Voice is Calling: Personal Vocation and Social Conscience*. Maryknoll, NY: Orbis Books. 2006.
- Henry Nouwen, *Discernment: Reading the Signs of Daily Life*. NY: Harper One. 2013.
- Parker Palmer, *Let Your Life Speak: Listening for the Voice of Vocation*. NY: Wiley. 1999.
- Jane Riess, *Flunking Sainthood: A Year of Breaking the Sabbath, Forgetting to Pray, and Still Loving My Neighbor*. Brewster, MA: Paraclete Press. 2011.
- Richard Rohr, *Falling Upwards: A Spirituality for the Two Halves of Life*. SF: Jossey-Bass. 2011.
- Mark E. Thibodeaux, *God's Voice Within: The Ignatian Way to Discover God's Will*. Chicago: Loyola Press. 2010.

DISCERNING ORDAINED MINISTRY IN THE DIOCESE OF OLYMPIA: A PHASED PROCESS



Expectations for Ordained Leaders in the Diocese of Olympia

The Five Expectations for Ordained Leaders, developed by the Bishop for ordained leaders, are central to discernment for ordained ministry. These criteria describe qualities of people the Diocese is seeking to ordain as priests and deacons, and these expectations guide everything that follows in this manual, and in the process of discernment for ordained ministry in this diocese.

We seek persons who:

Are spiritually grounded and Christ-centered;

We seek persons who have a practiced life of prayer, can articulate their faith in a way that draws others into "The Story," and who find strength in the Christian community and their own personal spiritual journey. We seek persons who are culturally aware and have a deep appreciation and experience with diversity. We seek persons who have a rule of life and experience in receiving spiritual direction and are willing to continue this path throughout their life.

Have a proven gift of gathering and developing a community;

We desire ordained leaders who have an entrepreneurial spirit and can articulate a proven history of connecting, inviting, inspiring, and unleashing the gathered body as well as the capacity for developing that body toward greater health and faithfulness over time. They demonstrate an ability to effectively articulate their faith verbally and in writing in a way that forms those to whom their words are addressed. We seek persons who have a deep love for the Church and a missionary heart for, and are grounded in, congregational life.

Practice Christian stewardship;

We seek persons who can articulate clearly their stewardship journey as it relates to money, resources and relationships, and who personally practice the tithe and are willing to be a living witness to it in their communities.

Demonstrate emotional maturity;

We seek clergy who are aware of who they are and their impact on others in their personal relationships, in their role as leaders in congregations, and in any role they play in the work of the diocese or the broader Church.

And understand authority;

Our clergy have a clear ability to be in touch with their own authority and respect the role of authority that is unique to our Anglican/Episcopal identity. They have a firm understanding of the polity of the Episcopal Church.

Also available on Appendix A

Discerning Vocations Manual: **Guide and Expectations For Those Exploring Calls to Ordained Ministry**

The Bishop—in partnership with the Commission on Ministry (COM), diocesan leaders, and staff—developed this Discerning Manual to empower congregations and discerners for Holy Orders as they discern together. It is our hope these guidelines will help provide tools for the best and most thorough discernment work. Thoroughness, thoughtfulness, and prayerfulness are central to Christian discernment.

For the purposes of this guide, **the term “clergy leader” refers to the rector, vicar, or priest-in-charge of the nominating congregation.** The clergy leader plays an integral role in this process from the moment a call is perceived through ordination.

Beginning a Process: This process begins when a person perceives a call for Holy Orders. Whether the person perceives this call within themselves, or the clergy leader sees the call, the process is the same. The person exploring a call to ordained ministry is called a **discerner. This person should complete the on-line form at https://dioceseofolympia1551.formstack.com/forms/discerner_reporting_form.** This information is collected on all discerners and held by the Vocations Secretary.

A discerner must be a confirmed member of the Episcopal Church and an active member of a congregation for at least one year before beginning the process described in this document.

During that time, the discerner should exhibit a stable connection to the congregation and with their relationship to God. Regular attendance and participation in Sunday liturgy and other congregational activities, modeling Christian stewardship, demonstrating a pattern of life that expresses a connection to God, and displaying healthy interpersonal relationships are characteristics of these connections.

Each discerner should complete two phases of group discernment prior to nomination. These are known in this diocese as *Phase 1* and *Phase 2*, and they serve different but related purposes.

Phase 1 involves a learning assessment process for the discerner guided by the clergy leader.

Note: Participation in *Mutual Discernment: Living into Our Baptismal Covenant* and *Phase 1* may occur concurrently, at the invitation and direction of the clergy leader, or they may unfold sequentially. These elements of discernment should be no less than one year in length.

Phase 2 involves formal discernment for Holy Orders, which is only initiated at the direction of the Bishop. A discerner seeking to begin *Phase 2*, with the support of the clergy leader, having embraced the work of *Phase 1*, and having participated in a mutual discernment group focused on baptized ministry, should schedule an appointment with the Bishop who will determine whether a *Phase 2* process shall commence. The Bishop will communicate that to the discerner, the clergy leader, and the Chair of the COM. The Bishop will also appoint at least one person to the *Phase 2* committee who is not a member of the discerner's congregation.

The clergy leader may participate in or facilitate the *Mutual Discernment: Living into Our Baptismal Covenant* group at their discretion. The clergy leader guides the *Phase 1* discernment process; however, they should

not participate in the discernment group for Holy Orders (*Phase 2*). If at any time during the process at the congregational level the clergy leader no longer senses a call in the discerner, the process will stop.

No group may begin *Phase 2* of the discernment process until:

- 1. The discerner meets with the Bishop, who initiates *Phase 2* and appoints a member of the discernment committee from another congregation.**
- 2. A representative from the COM has met with the entirety of the group and at least one Vestry/Bishop's Committee member. The clergy leader should attend this orientation meeting also. To schedule a meeting please contact the Chair of the COM.**

A Note About Timing: The entire process (*Phase 1 and Phase 2*) should take a minimum of two years; however, this process can take as long as three years, or more in some cases. What is most important is that the discerner has made significant progress on learning goals, the process has been observed in its full integrity, and that the end result is thoughtful and prayerful.

Discernment Groups:

It is expected that persons in the discerner's congregation other than the clergy leader will be involved in *Mutual Discernment: Living into Our Baptismal Covenant*, and *Phase 1* Discernment, and *Phase 2* Discernment, but these elements serve different functions and address different aspects of discernment. That said, the clergy leader may, at their discretion, appoint some persons to serve on both *Phase 1* and *Phase 2* committees. The pages that follow describe the purpose and process for each in more detail.

Phase 1 Learning:
Discerning in a Local Setting

Phase 1: Learning Assessment for a Discerner Guided by the Clergy Leader

The Clergy Leader is required canonically (Title III, Sec. 8, ff) to support the discerner's nomination for ordination at several points in the process, so it is incumbent on the Clergy Leader to have engaged the discerner individually and observed the discerner at work in community.

It is important that the two (Clergy Leader and Discerner) develop learning goals. The COM has developed Norms and Expectations of Discerners (Appendix C and copied below) to provide some guidance in this regard, but the Clergy Leader may adapt and augment those Norms and Expectations for reasons specific to the Discerner's formation or the community in which they serve. The timeline and length of *Phase 1* is also at the direction of the clergy leader.

In order for *Phase 2* to be considered by the Bishop, the Discerner will have needed to participate in *Mutual Discernment: Living into our Baptism Covenant* and *Phase 1* discernment with documentation written by the Clergy Leader describing that Learning Assessment and their support of the Discerner moving to *Phase 2*. The Clergy Leader may include written assessments by others who have participated in the Learning Objectives of *Phase 1*. *Appendix B: Holy Orders Assessment Tool* is offered as a template for this documentation, since it is guided by the Five Expectations of Ordained Leaders; *however*, the Clergy Leader may choose to substantiate their report using a different form.

Norms and Expectations for Discerners in the Diocese of Olympia

The Diocese of Olympia requires that all people exploring the ordination process participate in a mutual discernment group (known as *Mutual Ministry: Living Into Our Baptismal Covenant*), *Phase 1* learning assessment guided by the clergy leader, and a *Phase 2* Discernment group convened by the Clergy Leader in consultation with the Bishop. *Phase 2* Discernment is initiated by the Bishop only. The discerner must meet with the Bishop prior to beginning *Phase 2*.

The COM of the Diocese of Olympia, serving in advisory capacity to the Bishop, works with discerners, clergy leaders, discernment committees and the Bishop to ensure the discernment process is one of integrity, consistency, and mutuality in ministry. Healthy communication is paramount throughout the process. When in doubt about how best to proceed, please ask the question.

Because life in the community in which one is discerning is vitally important, all discerners are encouraged to develop practices in consultation with their clergy leader that are designed to provide learning experiences for the discerner while also enabling the community to see the discerner in leadership roles. While every discerner's circumstances are unique, the COM encourages every clergy leader and discerner to consider the following practices as part of their discerning experience:

1. Discerners will attend Sunday worship (at least one service) every week unless away on vacation.
2. Discerners will assume leadership roles in worship (Eucharistic minister, lector, worship leader, preacher, Eucharistic visitor) as guided by the clergy leader.
3. Discerners are encouraged to seek licensure as a Worship Leader and to gain experience leading the Daily Office.

4. Discerners are encouraged to preach at weekday or Sunday services, at the invitation of the Priest-in-Charge. The experience should be fruitful and life-giving for the preacher and the community.
5. Discerners are encouraged to attend and graduate from the College for Congregational Development.
6. The discerner and clergy leader will design a parish project which the discerner will lead, to provide an opportunity for learning about gifts essential to ordained leadership. Project focus could be pastoral, liturgical, formational, diaconal, or evangelical, and should stretch the discerner beyond their normal comfort zone.
7. Discerners will embrace a practice of seeking feedback from the clergy leader and other parish leaders on the expressions of ministry in the parish.
8. Discerners will inform the clergy leader in advance of any conversations with the Office of the Bishop or Canon to the Ordinary.
9. Discerners will take responsibility for this discernment process, meeting diocesan expectations and deadlines.
10. Discerners will engage in regular spiritual direction and will develop a rule of life or set of spiritual practices.

Phase 2: Discerning a Call
to Ordained Ministry
at the Bishop's Direction

Phase 2: Discerning a Call to Ordained Ministry

Participants: discerner, discernment group, Vestry/Bishop's Committee, and the clergy leader (who supports the discerner but does not participate in *Phase 2* group meetings).

Time: Nine to eighteen months. Discerners may not begin discernment for Holy Orders unless directed by the Bishop. The committee will not meet until a representative from the COM has met with the clergy leader, discerner, and all *Phase 2* discernment committee members. The duration of the required time begins with the meeting of the COM representative with the group.

Continued Learning: Work done in *Phase 1* should continue, guided by the clergy leader, and includes use of the assessment tools completed in *Phase 1*, setting addition learning goals, embracing the *Norms and Expectations of Discerners in the Diocese of Olympia*, and scheduling periodic meetings with the clergy leader to reflect on the various experiences related to one's ministry and vocational discernment. If the discerner has not yet done so, they should complete the on-line information form at https://dioceseofolympia1551.formstack.com/forms/discerner_reporting_form at this time.

Phase 2—Holy Orders Discernment: The clergy leader is responsible for forming the *Phase 2* Discernment Committee, in consultation with the Discerner, the COM Chair, and the Bishop. The clergy leader will invite a team of people from the parish, at least one of whom is a current Vestry/Bishop's Committee member, to serve on this committee. The clergy leader might also want to invite people from the discerner's life outside of church (e.g., work, friends). It is not appropriate that the clergy leader participate in these sessions. The Bishop will also appoint at least one person from outside the Discerner's congregation.

The meetings of this group will involve

- a) a review of the discerner's call,
- b) a frank discussion of learning goals and the progress made towards those goals,
- c) an exploration of holy life through the *Five Expectations for Ordained Leaders*, and
- d) a decision as to whether or not the discerner should be nominated to postulancy by the

Vestry/Bishop's Committee.

Following the conclusion of these meetings, the group writes a letter to the Vestry/Bishop's Committee and clergy leader recommending whether or not the discerner should be nominated for Holy Orders. The letter should include the group's observations of the discerner's strengths and weaknesses with respect to the "*Five Expectations for Ordained Leaders*."

If the discerner is recommended for nomination, the Vestry/Bishop's Committee convenes a special meeting with members of the *Phase 2* Discernment Committee and the discerner. First, the Vestry/Bishop's Committee hears from members of the *Phase 2* Discernment Committee and learns more about their experiences of the discerner. Secondly, the discerner is invited to join the conversation. After some discussion, the discerner is excused so that the Vestry/Bishop's Committee members may vote one at a time as to their recommendation. Finally, the discerner is invited back into the meeting and the Vestry/Bishop's Committee relays the result and explains their reasoning.

Applying for Postulancy / The Diocesan Process Towards Ordinations

Should the Vestry/Bishop's Committee nominate the discerner, they are known as a "nominee." The nominee completes an application for postulancy and submits it to the Secretary for Vocations. A description of the application and a checklist can be found on *Appendix H*. Note: there are deadlines for submitting completed applications.

Bishop Rickel will review submitted applications and will invite selected applicants to the *Postulancy Retreat*. The number of nominees attending the retreat will usually be limited to five for the priesthood (parochial), with the number of nominees for the diaconate remaining uncapped. It is also at Bishop Rickel's discretion to invite any combination of discerners to the *Postulancy Retreat* (e.g., four deacons, two priests).

The *Postulancy Retreat* will include group exercises and intensive interviews with members of the COM. After the nominees depart the retreat, the COM will meet and discern each nominee's call based on the application, the experiences at the retreat, and the interview. The COM will then submit the findings of their own discernment/discussion to Bishop Rickel; however, the Commission's findings are a recommendation to the Bishop, not a decision regarding postulancy.

Admission to postulancy is granted solely by Bishop Rickel. Nominees will be notified formally in writing, usually within a month following the retreat.

Minimum Requirements for Discernment

- The discerner has been an active confirmed/received communicant in good standing of the congregation for at least one year prior to the commencement of general vocational discernment.
- In certain situations, a COM-approved diocesan discernment group— e.g., young adults, or people of color—may apply to the discernment work in *Phase 1* or *Phase 2*. Please consult with the Secretary for Vocations for eligibility requirements. Participants in these groups must also be communicants in good standing in an Episcopal congregation and have been regular attendees of worship.
- The duration of discernment from the initial meeting with the clergy leader until the nomination for postulancy by the vestry shall be no less than two years.
- The discernment group for Holy Orders may not begin meeting until the discerner has met with the Bishop to initiate *Phase 2* and has appointed a member of the discernment committee from another congregation, and a member of the COM has met with the clergy leader, the entire *Phase 2* discernment committee, and at least one Vestry/Bishop's Committee member to provide orientation to the *Phase 2* process.
- The duration of *Phase 2* Discernment using the diocesan curriculum shall be no less than nine months.

Phase 2 Discernment: Curriculum Details

Overview of Phase 2 Discernment Process

The process of discerning a call involves a great deal of prayer, time, study, and thoughtfulness by the individual and by the Church; it may lead to a more intentional ministry in one's daily life, licensing for a liturgical/congregational ministry, or ordination. Regardless of the outcome of the process, the individual, the Discernment Committee, and the Church are strengthened by such careful listening to God and to one another.

Summarizing and Reviewing the Steps in the Discernment Process

1. The individual engages in ministry in the context of his/her faith community.
2. The individual begins to discern a call to particular ministry, which may include ordained ministry. (Discerner)
3. The Discerner begins to explore this call with their clergy leader.
 - a. The nature of ministry is explored.
 - b. This may take several months or years. This is known as *Phase 1* discernment.
4. Upon direction by the priest, the Discerner (now known as Discerner) will schedule a visit with the Bishop.
 - a. The Bishop may authorize the formation of a *Phase 2* discernment process, including the formation of a local discernment committee.
 - b. The Bishop may make other recommendations and ask for the Discerner to return at a later date.
 - c. The Bishop writes a letter/email to the Discerner and clergy leader to ensure everyone understands the process and what has been discussed during their visit.
 - d. If the Bishop authorizes a *Phase 2* discernment committee, he notifies the COM Chair of this and also appoints 1-2 persons to serve on the discernment committee.
5. The Discernment Committee is formed.
 - a. The clergy leader and Discerner confer about potential members of the committee, then the Priest prayerfully considers who to invite to serve on the committee, considering the following criteria:
 - i. There should be at least one vestry member on the Discernment Committee.
 - ii. There ideally will be a committee member with prior experience in work of discernment.
 - iii. There typically are 6-8 people on the Discernment Committee.
 - iv. There typically are no clergy or members of the COM on the Discernment Committee (unless approved and directed otherwise by the Bishop).
 - b. The clergy leader coordinates with COM Chair and the Discerner and Committee a time for the first meeting. The COM Chair provides orientation to the process at this meeting. It is imperative that all members of the committee, the Discerner and the clergy leader are present at this first meeting.
 - c. The clergy leader serves as a pastor to the Discerner during this process but does not engage the Discernment Committee in its work.
 - d. The COM Chair appoints a COM liaison to each Discerner.

6. The Discernment Committee meets for a period of 9-12 months, or longer as needed, guided by the Discerning Manual of the Diocese of Olympia. Each module is to be engaged holistically and with intention and care.
7. The Discernment Committee should usually meet at a church setting (not a home).

Discerning Vocations Manual: Curriculum and Session Guide

Introduction: This curriculum is designed to help discernment groups for Holy Orders in the second phase of the expectations outlined earlier in this document. It is specifically designed for the discerner to answer questions about their call and further explore ordained life. Following the conclusion of this group's work together, the discernment group will make a recommendation to the Vestry/Bishop's Committee as to whether the discerner should be nominated for postulancy.

[Note: while this document refers to an discerner in the singular, more than one discerner may participate in the same Holy Orders Discernment Group at the discretion of the clergy leader, with concurrence of the Bishop.]

This curriculum is based upon the *"Five Expectations of Ordained Leaders"* developed by the Bishop. Discernment groups for Holy Orders should follow this curriculum and may augment it with their own readings, questions, and discussion

The clergy leader should continue to support the discerner's growth and meeting of learning goals. The clergy leader's role is to provide pastoral support to the discerner, but he/she does not actively participate in the sessions, nor should the clergy leader engage committee members about the process.

Spouses/Partners: Formation for Holy Orders is a period of growth for the discerner, spouse/partner, and other members of the discerner's household. As a diocese, we hold the covenants made to spouses and partners as primary to ordination. Therefore, spouses and partners play an important role in this process. Spouses/partners will be invited into the discernment group for selected sessions and are encouraged to seek out spiritual support and guidance at this time.

Reading Material: This curriculum requires use of both the Bible and the BCP.

Using other materials is at the discretion of the discernment group convener. Suggested material is at *"Essential Elements of Mutual Discernment"* (see p. 6). You may also complement these suggested readings with those of your own choosing.

Jobs and Roles: To help facilitate meetings each group should select a convener and a secretary. Neither of these positions is appropriate for the discerner.

The **convener** is responsible for setting meeting dates, contacting the group, and distributing any materials (reading material, for example). The convener should be willing to be a point person for communications with Bishop Rickel or the COM regarding the discerner's process. The convener should be a detail-orientated person who doesn't mind monitoring meetings and pulling conversations back to point should they drift. It might be helpful if the convener has prior experience in small group leadership.

The **secretary** is a role that can be rotated among group members (again, with the exception of the discerner). Notes gathered by the secretary will form the basis of formal letters submitted to the vestry.

A **chaplain** is one who ensures the committee's sessions begin and end in prayer, and that all its work is guided by a sense of the Spirit's presence and guidance.

Outline of Discernment Modules*

Module 1: Orientation, Introductions, and Organizing of the Group

Module 2: Spiritual Timelines

Module 3: The Five Expectations and the Discerner's Journey

Module 4: Spouse, Partner and Household

Module 5: Alcohol, Substance Abuse, and Addiction

Module 6: Ordained Life

Module 7: Spiritual Grounding and Christ-Centeredness

Module 8: Gifts of Gathering and Developing Community

Module 9: Christian Stewardship

Module 10: Emotional Maturity

Module 11: Understanding Authority

Module 12: Healthy Boundaries

Conclusions and Preparation of the Committee' Report to the Priest and Vestry

**With advice and counsel from Ethnic Ministers in the Diocese of Olympia, the COM and Office of the Bishop commit to including updates to this guide that both help people discern their call to Anti-Racist ministries in the Diocese of Olympia and better facilitate authentic discernment for Black ministers, Indigenous Ministers and Ministers of Color. We commit beginning that work now and plan to update the document by September 2021.*

General Outline for Meetings

As outlined in *Phase 2* of the *Discerning for Holy Orders Guide*, groups meeting in this phase should meet for at least nine months. Plan to meet for at least ninety minutes each session, no less than once a month. For the group to maintain its rhythms and consistency of work, it is imperative that every person in the group prioritizes this in their schedules.

Discernment Groups for Holy Orders begin when the clergy leader and discerner agree that they are ready to visit the Bishop who is the sole authority to direct *Phase 2* to begin. This sort of discernment requires the passage of time for depth of relationship and for opportunity for reflection, and so it should take place over no less than nine months.

While there is no set time to begin meetings, you should not set your start date to conclude just before postulancy applications. Discernment is a journey, not a goalpost to reach. This curriculum has been designed to give tools for thoughtful, thorough, and prayerful work. It is the experience of the Bishop and the COM that these are the best possible conditions for Christian discernment.

Each group will eventually find its own rhythm and style. Groups should open and close each session with prayer. Each session should also include some time for personal sharing, prayer, and mutual support. Groups may also wish to occasionally spend a session in discernment conversations with other members of the group besides those discerning for orders. Groups are welcome to supplement, but not replace the curriculum with their own work. Some sessions have more structured work, and others simply have suggested readings with question prompts.

Module One: Orientation, Introductions, and Organizing of the Group

A representative from the COM will facilitate this first meeting, at which all committee members, the discerner, and the clergy leader must be present. After the orientation, the COM representative and clergy leader will depart, and the group will organize (scheduling meetings, assigning roles, etc.)

Module Two: Spiritual Timelines

Before you gather: For this meeting each person should prepare a personal timeline that tells the story of your life. Make sure you include the many aspects of your life: personal, vocational, family, and especially spiritual. It can be a literal timeline, or, if you are more creatively inclined, it could be a collage, cartoon, mural, graph, video, or whatever other medium best suits you. The discerner will also prepare a 5-8 page spiritual autobiography and distribute this to the group's members in advance of this meeting, providing time for them to read it and bring questions of clarification they may have.

Prayer: Read the Baptismal Covenant (BCP, pp. 304-305) as a group. Follow the reading with some silence.

Activity: Each member of the group should spend 8-10 minutes sharing their timeline and story, with an emphasis on spiritual journeys. If you need to break this up over two sessions, you may do so. Note the ways our spiritual journeys weave in and around and through our personal lives in ways we may not have noticed before. What similarities do our own timelines share? What differences? How are the group members' timelines connected? If time allows, the group begins reflecting with the discerner on their spiritual autobiography.

Module Three: The Five Expectations and the Discerner's Journey

Before you gather: Review discerner's learning goals from the first phase of discernment.

Prayer: Open with the collect For Vocation in Daily Work (BCP, p. 261)

Activity: Read the *Five Expectations of Ordained Leaders (Appendix A)* aloud. Speaking without interruption, the discerner shares the work they have done so far. This should focus on insights, and discoveries made during the work of *Phase 1*. Other members of the group share their experience of the discerner's leadership and personal growth.

Module Four: Spouse, Partners, and Household

Before you gather: Invite the spouse/partner or other significant person in the discerner's life into the group.

Prayer: Read Tobit 8:5-8

Discussion: What ministries do you engage in together? How has the discernment process changed life at home? What do you fear about the process moving forward? (Education, expense, changes in how the community sees you, time, etc.) What excites you about the process moving forward?

Module Five: Alcohol, Substance Abuse, and Addiction

This comes after the session on family.

Before you gather: If you so choose, invite the spouse/partner to this session. Write a paragraph about your experience with substance addiction.

Prayer: God, give me grace to accept with serenity the things that cannot be changed,
Courage to change the things which should be changed,
and the Wisdom to distinguish the one from the other.
Living one day at a time,
Enjoying one moment at a time,
Accepting hardship as a pathway to peace,
Taking, as Jesus did, this sinful world as it is,
Not as I would have it,
Trusting that You will make all things right,
If I surrender to Your will,
So that I may be reasonably happy in this life,
And supremely happy with You forever in the next. Amen.

- *The Serenity Prayer as published by Alcoholics Anonymous, from a prayer by Reinhold Niebuhr.*

Read: Proverbs 23:29-35 and Acts 2:1-6, 12-15.

Discussion questions for everyone:

- Variations of the above prayer are used for a variety of twelve-step programs. What part of the prayer has energy and power for you?
- What has been the impact of addiction in your life?
- Addiction is a chronic illness, not a moral failing. Why do you think we tend to avoid conversations about substance addiction and abuse?
- Does your congregation laugh at Peter's words from Acts "These people are not drunk, as you suppose. It's only nine in the morning!?" Did you laugh or snicker when you did this reading today? Why do you suppose there is laughter?
- There are a lot of jokes about Episcopalians and alcohol. "Whiskeypalians," "Where there's a fourth there's a fifth." Are these true? What do they inform our culture, both in the church and outside the church about who we are?
- What is your relationship with alcohol and other substances? Do you drink alcohol or use substance more often than you did five years ago? Ten years ago?
- What is your congregation's relationship with alcohol? How often is alcohol present at social gatherings?
- What concerns do you have about this topic as it relates to church leadership and authority?

Module Six: Ordained Life

Before you gather: If you so choose, invite the spouse/partner to this session. Read the Catechism, specifically the section titled Ministry (BCP pp. 855-856).

Prayer: Read 1 Timothy 3:1-13

Activity: Read the following Ordination rites: Bishop (BCP, pp. 512-523), Priest (BCP, pp. 524-535), Deacon (BCP, pp. 536- 547), The Litany for Ordinations and Additional Directions (BCP, pp. 548-555). Take turns sharing what each member believes a deacon, priest, and Bishop to be. Discuss what each member believes a deacon, priest, and Bishop do. What are the differences between what an ordained person is and what an ordained person does? Are there hidden or cultural expectations to these roles? Are there elements of the roles members of the group disagree about? What aspects of the roles or duties of ordained life frighten or concern the discerners? In what roles or duties of ordained life does the discerners expect to delight?

Module Seven: Spiritual Grounding and Christ-centeredness

Before you gather: Prepare a spiritual diary for the week. Record prayer times, spiritual insights, and other relevant details that will help others understand how you experience Christian spirituality.

Prayer: Read any of the collects found on BCP pp. 256-257. Read one or more of the following: Psalms 77: 11-12, Psalms 87:11, Joel 1:12-13, Philippians 4:8-9, Colossians 3:1-17, Colossians 4:2-6, Ephesians 5:1-2, 1 Peter 2:9-10, Romans 8:26-27, 2 Peter 1:3-11.

Activity: Each member shares a highlight from their diary. How do you experience God in your daily life? What provides you with peace in the midst of turmoil or struggle? What role does Creation (the created world, people, creatures) play in your spirituality? What role does Jesus Christ play in your spirituality? What role does the Holy Spirit play in your spirituality?

Module Eight: Gifts of Gathering and Developing Community

Before you gather: Write a paragraph about a time when you felt a sense of belonging in community.

Prayer: Read Acts 2:42-47 and 4:32-35.

Discussion: Each member shares a time when they felt a sense of community. What person or people made that sense of community possible? What relationship did you sense the gatherer had with that community? The discerners tell about a time he or she gathered a group within the congregational community or another church-related community. Reflect as a group on how the discerners functioned as a community leader.

Module Nine: Christian Stewardship

Before you gather: Consider having all members fill out the Financial Information form that is submitted with a nomination for postulancy (form can be obtained from the Postulancy Application webpage: <https://resources.ecww.org/postulancy-application>).

Prayer: Read the collect for stewardship of creation (BCP, p. 259). Read one or more of the following: Leviticus 27:30, Matthew 25:14-30, Luke 16: 10-13, Luke 12:33-34, 2 Corinthians 9:7.

Discussion: Stewardship is one of Bishop Rickel's three focus areas.

In "A Vision for the Diocese of Olympia" he writes, "We believe Christianity is a faith of abundance and blessing. Becoming a people truly in touch with this reality makes us stewards of all of our resources—human, financial, material, and spiritual. At Creation, God gave us responsibility for the care of the earth. More than ever before, we are aware that what we do affects those in the next generations. Jesus teaches us that when we live for others we have abundant life. We assist congregational leaders in strengthening the stewardship of all resources in their congregations, and we practice this at a diocesan level." Reflect on Bishop Rickel's comment about stewardship. Give an example of Christian stewardship in your life and community. What did you learn about God from practicing stewardship?

Reflect as a group on Carl Knirk's Steps for Financial Discipleship.

1. Everything you have is a gift from God.
2. No one has everything, no one has nothing.
3. All you have you will lose.
4. While you are in possession of it, you, and only you decide how to use it.
5. How you use everything that passes through your hands will determine the kind of person you are and will become—Gratitude begets Gratitude.

How does your family practice financial discipleship? How do you share what you have?

Module Ten: Emotional Maturity

Before you gather: Read Titus 2:1-8. What are possible motivations for Titus' instructions for Christian leaders?

Prayer: Read any of the following: Prayer for Guidance (BCP, p. 832 #57 or #58), Prayer attributed to St. Francis (BCP, p. 833).

Discussion: Share an example from your life when you were emotionally immature. What did you learn? Why is it important for Christian leaders to be emotionally mature? What area(s) in your life could benefit from emotional maturation? What gifts for ministry have emerged from your personal struggles and growth?

Module Eleven: Understand Authority

Before you gather: Think of examples of when you 1) have exercised authority over others and 2) experienced the authority of others.

Prayer: Read Jeremiah 1:4-10 or Titus 3:1-2.

Discussion: Where does authority for ministry come from? How do you know when you have authority? What challenges you about being obedient to God? To people in authority? What challenges you about exercising authority?

Module Twelve: Healthy Boundaries for Clergy

Prayer: The Prayer of St. Francis

Read Ephesians 5:1-4 and the Examination and subsequent questions from the Ordination Rite (BCP, pp. 531-532 or pp. 543-544).

Discussion: Healthy boundaries are important for clergy and congregational well-being, and yet clear lines are not always apparent. It is helpful to anticipate potential situations in which ethical questions must be answered. Using one or more of the scenarios in *Appendix D*, and the questions that follow each, engage in conversation about the scenario and how you might act in such a situation. Note: there are scenarios for priests and deacons offered for your group's use.

Conclusions and Preparation of the Committee's Report to the Priest and Vestry

When the Discernment Committee believes that it is nearing completion of its discussions with the Discerner, the Convener communicates with the COM Contact about next steps. The Convener distributes copies of the *"Report of the Discernment Committee to the Priest and Vestry" (Appendix F)* to the Discernment Committee members.

Session to Prepare Report to Priest and Vestry

The Discernment Committee meets without the Discerner and prepares the "Report to the Priest and Vestry." The COM Contact advises the committee as needed to follow the framework and helps the committee provide specific, clear, helpful information.

Session to Prepare Report to Priest and Vestry – Discerner and Discernment Committee

The Discernment Committee meets with the Discerner and reviews the report with them. Revisions may be made guided by this discussion.

The Discernment Committee submits the "Report to the Priest and Vestry" to the Priest. The Priest and Vestry may invite members of the Committee to the regularly called Vestry meeting to address questions they may have. The Committee members then depart the meeting, and the Vestry meets with the Discerner. If the Vestry accepts the recommendation for ordained ministry, it completes a letter of Support for the Nomination to Postulancy (see Appendix G) and sends it to the Bishop and the Secretary for Vocations.

Appendices

Appendix A: Expectations for Ordained Leaders in the Diocese of Olympia

We seek persons who:

Are spiritually grounded and Christ-centered;

We seek persons who have a practiced life of prayer, can articulate their faith in a way that draws others into “The Story,” and who find strength in the Christian community and their own personal spiritual journey. We seek persons who are culturally aware and have a deep appreciation and experience with diversity. We seek persons who have a rule of life and experience in receiving spiritual direction and are willing to continue this path throughout their life.

Have a proven gift of gathering and developing a community;

We desire ordained leaders who have an entrepreneurial spirit and can articulate a proven history of connecting, inviting, inspiring and unleashing the gathered body as well as the capacity for developing that body toward greater health and faithfulness over time. They demonstrate an ability to effectively articulate their faith verbally and in writing in a way that forms those to whom their words are addressed. We seek persons who have a deep love for the Church and a missionary heart for, and are grounded in, congregational life.

Practice Christian stewardship;

We seek persons who can articulate clearly their stewardship journey as it relates to money, resources and relationships, and who personally practice the tithe and are willing to be a living witness to it in their communities.

Demonstrate emotional maturity;

We seek clergy who are aware of who they are and their impact on others in their personal relationships, in their role as leaders in congregations, and in any role they play in the work of the diocese or the broader Church.

And understand authority. Our clergy have a clear ability to be in touch with their own authority and respect the role of authority that is unique to our Anglican/Episcopal identity. They have a firm understanding of the polity of the Episcopal Church.

Appendix B: Holy Orders Assessment Tool **(A worksheet to be used with those in discernment for Holy Orders)**

This worksheet is to be used during *Phase 1* of the discernment process outlined in the Discerning Vocations Manual, and should be revisited again before starting *Phase 2*. This is a self-assessment tool for those in discernment for Holy Orders. It should be used by the discerner, the clergy leader, and those selected by the discerner and clergy leader together.

We are looking for evidence that the characteristics outlined in the *Five Expectations* are already present in some form. Early in the journey toward Holy Orders all these things may not be fully present. However, the expectation is that we will see some of these things already being lived. We will also see a longing for and openness to the other ways of functioning.

The Diocese of Olympia seeks persons who: Are spiritually grounded and Christ-centered;

We seek persons who have a practiced life of prayer, can articulate their faith in a way that draws others into "The Story," and who find strength in the Christian community and their own personal spiritual journey. We seek persons who are culturally aware and have a deep appreciation and experience with diversity. We seek persons who have a rule of life and experience in receiving spiritual direction and are willing to continue this path throughout their life.

Observed Strengths:

Areas Needing Development:

Other Questions, Comments, & Notes:

**The Diocese of Olympia seeks persons who:
Have a proven gift of gathering and developing a community;**

We desire ordained leaders who have an entrepreneurial spirit and can articulate a proven history of connecting, inviting, inspiring and unleashing the gathered body as well as the capacity for developing that body toward greater health and faithfulness over time. They demonstrate an ability to effectively articulate their faith verbally and in writing in a way that forms those to whom their words are addressed. We seek persons who have a deep love for the Church and a missionary heart for, and are grounded in, congregational life.

Observed Strengths:

Areas Needing Development:

Other Questions, Comments, & Notes:

**The Diocese of Olympia seeks persons who:
Practice Christian stewardship;**

We seek persons who can articulate clearly their stewardship journey as it relates to money, resources and relationships, and who personally practice the tithe and are willing to be a living witness to it in their communities.

Observed Strengths:

Areas Needing Development:

Other Questions, Comments, & Notes:

The Diocese of Olympia seeks persons who:

Demonstrate emotional maturity;

We seek clergy who are aware of who they are and their impact on others in their personal relationships, in their role as leaders in congregations, and in any role they play in the work of the diocese or the broader Church.

Observed Strengths:

Areas Needing Development:

Other Questions, Comments, & Notes:

The Diocese of Olympia seeks persons who:

Understand authority:

Our clergy have a clear ability to be in touch with their own authority and respect the role of authority that is unique to our Anglican/Episcopal identity. They have a firm understanding of the polity of the Episcopal Church.

Observed Strengths:

Areas Needing Development:

Other Questions, Comments, & Notes:

Based on your assessment

My/the discerner's most significant strengths are (these are areas to build and expand):

My/the discerner's areas of concern are (areas that if not addressed are likely to get in the way of the discerner's movement towards Holy Orders):

Other comments or notes:

Appendix C: Norms and Expectations for Discerners in the Diocese of Olympia

The Diocese of Olympia requires that all people exploring the ordination process participate in a mutual discernment group (known as *Phase 1* Discernment) and a *Phase 2* Discernment group convened by the Clergy Leader in consultation with the Bishop.

The COM of the Diocese of Olympia, serving in advisory capacity to the Bishop, works with discerners, clergy leaders, discernment committees, and the Bishop to ensure the discernment process is one of integrity, consistency, and mutuality in ministry. Healthy communication is paramount throughout the process. When in doubt about how best to proceed, please ask the question.

Because life in the community in which one is discerning is vitally important, all discerners are encouraged to develop practices in consultation with their clergy leader that are designed to provide learning experiences for the discerner while also enabling the community to see the discerner in leadership roles. While every discerner's circumstances are unique, the COM encourages every clergy leader and discerner to consider the following practices as part of their discerning experience:

1. Discerners will attend Sunday worship (at least one service) every week unless away on vacation.
2. Discerners will assume leadership roles in worship (Eucharistic minister, lector, worship leader, preacher, Eucharistic visitor) as guided by the clergy leader.
3. Discerners are encouraged to seek licensure as a Worship Leader and to gain experience leading the Daily Office.
4. Discerners are encouraged to preach at weekday or Sunday services, at the invitation of the Priest-in-Charge. The experience should be fruitful and life-giving for the preacher and the community.
5. Discerners are encouraged to attend and graduate from the College for Congregational Development.
6. The discerner and clergy leader will design a parish project which the discerner will lead, providing opportunity for learning about gifts essential to ordained leadership. Project focus could be pastoral, liturgical, formational, diaconal, or evangelical and should stretch the discerner beyond their normal comfort zone.
7. Discerners will embrace a practice of seeking feedback from the clergy leader and other parish leaders on the expressions of ministry in the parish.
8. Discerners will inform the clergy leader in advance of any conversations with the Office of the Bishop or Canon to the Ordinary.
9. Discerners will take responsibility for this discernment process, meeting diocesan expectations and deadlines.
10. Discerners will engage in regular spiritual direction and will develop a rule of life or set of spiritual practices.

Appendix D: Healthy Boundaries for Clergy – Scenarios for Clergy in Congregations, by The Rev. Dr. Dennis Tierney

What follows are a series of scenarios invented to highlight boundary issues that often occur in congregational ministry but that are not about sexual misconduct. You are invited to pick one, read it over carefully, consider the questions that follow the scenario, and then have a conversation with the person next to you. Then, we will have an at-large conversation about the scenario and the underlying issue it seeks to illuminate. These will be timed conversations.

Scenario One

You are the new vicar of a congregation. The 8:00 am service on Sunday is, of course, Rite I. You hate Rite I; find it distasteful on numerous accounts. But that service draws a steady group of worshippers that is about one-third of the attendance at the main service and all of the 8:00 am group pledge substantially and comprise a goodly portion of the leadership of the congregation. Your first efforts to modify the service have met with resistance – polite and kind, but resistant.

1. Is this a boundary issue? If so, what are the boundaries being crossed/challenged?
2. What are the elements of this dilemma – is this a theological problem, a liturgical problem, a formation problem, or a power problem? What do you need to learn or know to think through this problem?
3. What are the stakes in this problem? Who has a stake in this problem?
4. What are the possible outcomes of addressing this issue? What are the upsides and downsides of addressing this particular issue?
5. If a colleague shared this issue with you, what advice/comments would you make?

Scenario Two

You are the new rector in town. You are currently renting a place but would like to buy a home. Three members of your congregation are real estate agents. All three have approached you with offers to help you find a wonderful new home. One of them really understands your issues; one is a senior agent in town and could really get you a good deal but is a bit overbearing; the third is brand-new, is the poorest of the group, and really needs a client. They are kindly pressing you for an answer.

1. Is this a boundary issue? If so, what are the boundaries being crossed/challenged?
2. What are the elements of this dilemma – is this a theological problem, a liturgical problem, a formation problem, or a power problem? What do you need to learn or know to think through this problem?
3. What are the stakes in this problem? Who has a stake in this problem?
4. What are the possible outcomes of addressing this issue? What are the upsides and downsides of addressing this particular issue?
5. If a colleague shared this issue with you, what advice/comments would you make?

Scenario Three

You spoke casually at coffee hour about your summer vacation plans. A parishioner offers you a free stay at their vacation condo in the very place you would love to visit. The parishioner has strong views on several topics that vestry is working on. There has been no mention of any relationship between the offer of a free stay for your family and the other parish issues, yet. Others have urged you to accept the offer; no one has said otherwise. Saying yes would solve so many other problems – costs, etc. Your family has voted enthusiastically for a yes.

1. Is this a boundary issue? If so, what are the boundaries being crossed/challenged?
2. What are the elements of this dilemma – is this a theological problem, a liturgical problem, a formation problem, or a power problem? What do you need to learn or know to think through this problem?
3. What are the stakes in this problem? Who has a stake in this problem?
4. What are the possible outcomes of addressing this issue? What are the upsides and downsides of addressing this particular issue?
5. If a colleague shared this issue with you, what advice/comments would you make?

Scenario Four

It is December and you and vestry are struggling with the annual budget. The diocese has released its COLA information which provides for a 2.5% increase in clergy salary. Your pledges don't cover the cost of any salary increases. Since you are the only full-time person, your salary is the largest and, therefore, your increase will be the biggest in dollar amounts. The congregation adores you, the vestry is very pleased with your efforts, attendance is growing, and young families have joined the church since you arrived. But there are other employees to think about and some maintenance that has been put off for some time to pay for. The senior warden wants to give you the raise you deserve but argues that no other raises can be awarded.

1. Is this a boundary issue? If so, what are the boundaries being crossed/challenged?
2. What are the elements of this dilemma – is this a theological problem, a liturgical problem, a formation problem, or a power problem? What do you need to learn or know to think through this problem?
3. What are the stakes in this problem? Who has a stake in this problem?
4. What are the possible outcomes of addressing this issue? What are the upsides and downsides of addressing this particular issue?
5. If a colleague shared this issue with you, what advice/comments would you make?

Scenario Five

A new capital campaign has been approved. The planning committee will be meeting to begin the work. The Chair of the committee, a very senior member of the congregation, beloved by all, and with knowledge and influence to make this campaign a success prefers to meet at his home since he doesn't like to drive at night. He has offered to host all the meetings, with dinner, at his expense. In fact, it appears that this is the price of his chairing the group. Having dinner provided, in a congenial setting, appeals to the other members of the committee.

1. Is this a boundary issue? If so, what are the boundaries being crossed/challenged?
2. What are the elements of this dilemma – is this a theological problem, a liturgical problem, a formation problem, or a power problem? What do you need to learn or know to think through this problem?
3. What are the stakes in this problem? Who has a stake in this problem?
4. What are the possible outcomes of addressing this issue? What are the upsides and downsides of addressing this particular issue?
5. If a colleague shared this issue with you, what advice/comments would you make?

Scenario Six

You have been called to a new congregation but in the same town where you have been serving for several years. You decide not to move. That means you will run into former parishioners at the grocery store, local gas station, local farmer's market, etc. Your Letter of Separation stipulates no pastoral engagement with former parishioners. But you get phone calls from time to time; invitations to events, and questions in the vegetable department. You had claimed publicly that you loved your former congregation but that God had called you to this new ministry. What do you say, what do you do? Did you really love your former congregation? If so, in what sense since you now claim that you really love your new congregation?

1. Is this a boundary issue? If so, what are the boundaries being crossed/challenged?
2. What are the elements of this dilemma – is this a theological problem, a liturgical problem, a formation problem, or a power problem? What do you need to learn or know to think through this problem?
3. What are the stakes in this problem? Who has a stake in this problem?
4. What are the possible outcomes of addressing this issue? What are the upsides and downsides of addressing this particular issue?
5. If a colleague shared this issue with you, what advice/comments would you make?

Appendix E: Healthy Boundary Issues for Deacons – Scenarios for Deacons

**“You are to serve all people, particularly the poor, the weak, the sick, and the lonely.....
You are to interpret to the Church the needs, concerns, and hopes of the world.”** (BCP, p. 543)

PART I

Deacons are under the direct authority of the Bishop and are accountable to the Bishop but are often assigned to serve in a parish or mission and thus come under the purview of the rector or vicar. Canon III, Section 4 of the Constitution and Canons of the Episcopal Church states, “Deacons assigned to a congregation or other community of faith act under the authority of the Member of the Clergy or other leaders exercising oversight in all matters concerning the congregation” (p.72). Section 4(a) states that “Deacons may have a letter of agreement setting forth the mutual responsibilities in the assignment and, if such a letter exists, it is subject to renegotiation with the Vestry/Bishop’s Committee after the resignation of the Rector or Priest-in-Charge.” (p. 72).

Scenario One

Deacon Mary has been serving Saint Philomena’s Parish for over a decade. She is passionately committed to her ministry with the homeless. She knows that the parish hall is never used on Sunday evenings and seldom used two other nights a week. With winter coming, she is deeply concerned about the plight of the homeless and believes that using the parish hall as a shelter will be needed and in keeping with her understanding of the Gospel, our baptismal covenant, and her own ordination vows. One cold afternoon, she gets a call from the Director of the only shelter in town. They are filled to capacity for the night; can she help in some way?

1. What should Deacon Mary do that night?
2. What should Deacon Mary do in the longer term?
What boundaries are involved in this scenario?
3. How might Mary discern her obligations to her ordination vows and her obedience to the discipline of the church?

Scenario Two

Deacon Gene has served his parish for over fifteen years and served with two rectors and three interims during that time. Now, he is serving during another time of transition. He has a clearly defined ministry within the community that has been supported by the parish in the past but budget issues have come up and some programs may be cut. Gene has been supporting some of his ministry out of his own pocket. He is also aware of some tension in the church about the last rector and about the future direction of the parish. The new interim priest will be starting next week.

1. What should Deacon Gene say to the new interim priest?
2. What should Deacon Gene say to the vestry about his role during this time of transition?

3. What should Deacon Gene not do or say during this time of transition?
4. What boundary issues are embedded in this scenario?

PART II

Deacons serve in liturgies and have particular roles but are not in charge of the liturgical or musical life of the churches in which they serve.

Scenario Three

Deacon Samantha has been assigned by the Bishop to serve a new parish. Samantha is a gifted singer and particularly loves the Easter Vigil. It is always a joy for her to sing the “Exultet.” She is upset to learn that this parish will be doing a very contemporary vigil service using a liturgy that does not include the “Exultet.” In fact, her role will be quite minimal in this service. She feels left out and bereft of the spiritual joy she gets from being part of the traditional Easter Vigil.

1. What should Deacon Samantha do about this situation?
2. How might she deal with her feelings about this liturgical decision?
3. What should she say or do when her former parishioners ask her about the Easter Vigil?
4. What boundary issues are present in this scenario?

Scenario Four

Deacon Bob is an old-school type of guy. He finds that the worship style at the parish he serves has grown overly casual and, in his view, sloppy. The priest doesn’t seem to notice all the little mistakes that occur in worship. Some of the altar guild agree with Bob and lament the good old days when things were done properly. Others are not concerned at all about this problem and think Bob is being fussy and narrow-minded. Bob finds that his own spirituality is suffering as he spends more time noting mistakes than praying.

1. What should Deacon Bob do about his feelings and perceptions?
2. What should Bob say or not say to those altar guild members who complain to him?
3. How might Bob address this situation in a helpful and respectful way?
4. What boundary issues are present in this scenario?

Scenario Five

Deacons often spend considerable time in non-church locations and sometimes work alone without direct supervision.

Deacon Rafael is a retired widower and his diaconal ministry occupies most of his time. He is the one who visits the lonely, the sick, and those in nursing homes on a regular basis. While he tries to not do this alone, sometimes he cannot get a friend to accompany him on home visits. Because of his compassion for these

lonely souls who delight in seeing him, he has drifted into the habit of seeing a few people alone. One lady does not seem to have anyone else in her life. Recently, Rafael has noticed a slight deterioration in her appearance and a more cluttered home. This person is very private and dignified. She dislikes having strangers in her home and has expressed this to Rafael. She has also stated that she would rather die than go to a nursing home.

1. What should Deacon Rafael do about this situation? Who should he contact?
2. Where is he at risk in his current behaviors?
3. How might he address this situation in a helpful and respectful way?
4. What boundary issues are present in this scenario?

PART III

Deacons may or may not have assigned office space at a congregation and may not have access to church computers, cell phones, or other church-paid equipment used in their ministry.

Deacon Martha is serving a small pastoral-sized parish that has both space and budget problems. Martha has no office space assigned to her at the parish, but she is uncomfortable meeting with people in the parish lobby. Moreover, she does not have an office computer or phone, so she has been using her own tablet and cell phone to do her ministry. Currently, there is no budget to cover her expenses. As her ministry has grown, she is increasingly using her own home as a workplace, holding meetings there because it is more comfortable and provides better hospitality. She is also running a large phone and computer bill each month to support her ministry at the church. If she upgrades her phone and tablet, she will be much more efficient in her ministry.

1. What should Deacon Martha do about her situation?
2. Where is she at risk in her current situation?
3. How might she address her situation in a helpful and respectful way?
4. What boundary issues are present in this scenario?

Appendix F: Sample Report of the Phase 2 Discernment Committee to the Rector and Vestry

(Name of Discerner)

(Name of Congregation)

(Date)

(COM Contact)

The findings of the Discernment Committee should adequately report the committee's work with the Discerner and include a recommendation for the Rector and Vestry to consider in its Nomination process. Using the *Five Expectations of Ordained Leaders in the Diocese of Olympia (Appendix A)* as the guide for this work. The following questions might also serve the committee in its coalescing the insights learned during your meetings as you compile the report.

1. What is this person's understanding of Christian ministry?
2. How is this person growing in the Christian faith?
3. Describe the current and past ministries of this person.
4. What is this person's capacity to learn?
5. What is the status of this person's physical and emotional health?
6. Describe this person's leadership style and roles?
7. How does this person demonstrate his/her ministry in the Church? In the World?
8. What do you believe is this person's call to ministry?
9. What additional training, skills and resources does this person need to respond to this call?

What is the Committee's Recommendation?

Signed: _____

For the Discernment Committee (and list names of all committee members)

Appendix G: Sample Form for Rector and Vestry Nomination for Postulancy

Certificate of Rector and Vestry
Nomination for Postulancy
Title III, Canon 8, Section 2(a)

The Right Reverend Gregory H. Rickel
Bishop of the Diocese of Olympia

WE, whose names are hereunder written, testify to our belief based on 1) personal knowledge and/or 2) on evidence satisfactory to us that _____ is a confirmed communicant of this Church in good standing. We do furthermore declare that, in our opinion, they possess such qualifications as fit them to be admitted a POSTULANT FOR HOLY ORDERS in this diocese. We do set forth the grounds upon which we make our judgment of the applicant’s qualifications in the appended statement and as an outcome of our conversation with the Discerner in a duly-called meeting of the Vestry/Bishop’s Committee. In addition, we pledge to be involved in and financially supportive of _____’s preparation for ordination to the Sacred Order of Priests/Deacons.

Signed: _____ Date: _____
[Member of the Clergy Exercising Oversight]

[To be signed by a two-thirds majority of the Vestry/Bishop’s Committee]

Attestation

I hereby certify that the foregoing certificate was signed at a duly-called meeting of the Vestry/Bishop’s Committee of _____ convened at _____, on the ___ day of _____, 20__, and the signatures included above are those of a two-thirds majority of the members of the Vestry.

Signed: _____ Date: _____
[Secretary of the Vestry]

Appendix H: Checklist for Nomination to Postulancy

Postulancy for: **Priesthood** **Diaconate** **Reception**

Name: _____

Congregation: _____

Sponsoring Priest: _____

Discernment Group (date) _____ to _____

Written acceptance of nomination and request to be admitted to postulancy _____

Application (with essays) _____

Discernment description _____

Financial disclosure forms

 Financial information/worksheet _____

 Financial assessment (personal) _____

 Financial assessment (family member, if applicable) _____

Official transcripts (from all post-secondary education) _____

Letters of support from:

 Vestry/Bishop's Committee _____

 Clergy/Leader exercising oversight _____

 Discernment group _____

Congregational Statement of Financial Support (with budget showing line item) _____

Meeting with Bishop Rickel _____

Documents to be gathered and provided by the diocese

Invitation to Postulancy Retreat, if no briefly explain next steps (if any) _____

IntelliCorp Background check _____

Admit to Postulancy Yes No

Appendix I: Discernment Glossary for Roles and Responsibilities

Discerner

- One who is discerning a call to ordained ministry in this diocese. Occasionally the term “aspirant” is used, but “Discerner” is preferable.
- After *Phase 2*, if the person is nominated by their clergy leader and vestry for postulancy, they are known as an Nominee.
- Completes an application for postulancy per guidelines developed by the Bishop and the Commission on Ministry.
- If invited by the Bishop, attends the Postulancy Retreat.

Bishop

- Provides overall direction in the discernment process.
- Maintains a pastoral relationship with the participants in the process.
- Authorizes *Phase 2* Discernment Processes.

Candidate for Holy Orders

- Canonical term for one who has been a Postulant who is admitted to Candidacy for Holy Orders by the Bishop, advised by the Commission on Ministry, to engage in a period of intentional formation guided by the Bishop.

Chaplain (of the Discernment Committee)

- A Chaplain is one who cares pastorally for a particular place or group of people.
- Makes sure the meetings begin and end with prayer.
- Leads any worship service the Discernment Committee wants to have.
- Reminds the Discernment Committee that this is a spiritual experience and should be grounded in prayer.

Commission on Ministry (COM)

- As the canonical body that counsels the Bishop in matters of ministry, the COM develops policies and procedures related to discernment of ministry, lay and ordained, in this diocese.
- Keeps up-to-date with the progress of the Discernment Committee through the COM Liaison.
- Provides support for the Discerner, the Priest, and the Discernment Committee.

COM Chair

- Advises the Priest and Discerner in the design and intent of *Phase 2* Discernment in this Diocese.
- Facilitates the first meeting of the Discernment Committee.
- Assigns a COM Liaison to support the Discerner and Committee.
- Advises with the Discernment Committee to help them in the preparation of the “Report to the Vestry and Priest.”

Committee Member (*Phase 2 Discernment*)

Many people who are asked to be on a Discernment Committee say with reluctance, "What do I have to offer? Who am I to judge?" The basic qualifications are within each of us in our life experiences and in the Christian commitment we offer. Members of the Discernment Committee must be willing to be open, honest, assertive, supportive, and candid in the context of a caring community. No committee member should ask a question that they are not willing to answer. Every committee member should engage the process as an opportunity for mutual discernment, trusting that the experience will benefit every person involved.

Congregation:

- The congregation is encouraged to keep Discerner, the Discernment Committee, and the discernment process in its prayers.

Convener:

- Makes sure that meeting times are set, and Discernment Committee is notified.
- Makes sure that all the areas of discussion are covered.
- Makes sure that the meetings begin and end on time.
- Makes sure that the Discernment Committee stays on task.
- Keeps the COM Contact informed and asks for help when needed.

Discerner:

- A Discerner is one who feels called by God to a special ministry; one who is trying to discern God's call to them.
- Prepares their Spiritual Autobiography.
- Reviews their Spiritual Autobiography with the Discernment Committee.
- Answers questions to help the Discernment Committee in discerning their gifts and ministry.
- Involves appropriate family members as guided by the Discerning Manual.
- Adopts the Norms and Expectations of Postulants and Discerners in this diocese.

Postulant

- Canonical term for one admitted by the Bishop, advised by the Commission on Ministry, to engage in a period of intentional formation guided by the Bishop.

Priest (Rector/Vicar)

- Meets with the Discerner and guides *Phase 1* Discernment.
- If the Priest is supportive of the Discerner continuing further, they encourage the Discerner to meet with the Bishop.
- If the Bishop authorizes *Phase 2* Discernment, the Priest seeks input from the Discerner on potential members of the Committee, and then prayerfully extends invitations to join the Committee.
- Attends the orientation meeting of the Discernment Committee.
- Serves as pastoral support to the Discerner, but does not engage the Discernment Committee in its work, except when they deliver the reports to the Rector and Vestry for its consideration of Nomination for Postulancy.

Recorder:

- Takes notes of the meetings.
- Distributes notes to the Discernment Committee.

Vestry/Bishop's Committee

- Receives updates on the progress of the Discernment Committee through the Committee's Vestry Liaison.
- Receives the report from the Discernment Committee and its recommendation.
- Prayerfully considers the Nomination of the Discerner to Postulancy for Holy Orders and signs the form (*Appendix G*). At least two-thirds of the Vestry/Bishop's committee must sign the nomination form, along with the Rector, Vicar, or Priest-in-Charge, for it to move forward per Title III Canons. (The Vestry/Bishop's Committee is not another "discernment committee;" rather, it is certifying the Discernment Committee's work as valid.)

Vestry/Bishop's Committee Liaison

- Makes periodic reports to the Vestry/Bishop's Committee about the progress of the Discernment Committee.
- Along with the Priest, educates the Vestry/Bishop's Committee about its role in the process.