

Appendix C – PDC Orientation Packet

ORIENTATION PACKET for Parish Discernment Committees in the Diocese of Central Florida

THANK YOU for agreeing to serve on this Parish Discernment Committee (PDC). You and your fellow members play a vital role in helping the Church identify and develop the leaders we need to be healthy in the years to come.

These are the steps you and the PDC will follow in this adventure.

Meeting #1 *In Attendance: COM Representative, Rector/Vicar, PDC, Aspirant (and Spouse)*

1. **Open with prayer by Rector.**
2. **Rector introduces COM Rep and PDC Chair.**
3. **Appointment of secretary** to keep notes on all PDC Meetings
4. **All briefly share who they are**, their history at the church, etc.
5. **COM Rep distributes copies of this ORIENTATION PACKET** to PDC members, Rector/Vicar, Aspirant, and spouse and walks the group through this document, hitting the highlights, to orient them to their task.

This Process consists of at least seven meetings over a period of several months. The PDC may feel the need to meet more than seven times, with or without the aspirant. Each committee will need to decide how many meetings are required. All tasks must, however, be completed in sufficient depth to allow:

- A. The PDC to come to the point of being able to make a recommendation to the Rector and Vestry**
- B. The Rector/Vicar and Vestry to be able to decide whether to endorse the Nominee for Postulancy to the Bishop and Commission on Ministry.**

PLEASE read this entire OUTLINE before the next meeting.

The role of the PDC: the PDC should be comprised of 5 to 7 members, at least one of whom shall be a member of the Vestry of the congregation. **It is the particular function of the PDC to help Nominees identify, discover, and explore the varieties of ministry in the Lord's service. Most of all, the PDC represents the parish family in helping individuals affirm their special gifts of ministry.** It is not a support group *per se* but should attempt to create a caring and questioning environment in which a Nominee can risk testing his or her vocational aspirations. As the PDC facilitates exploration for the individual, it also carries the discernment process into the larger community.

The PDC is asked to enter into a special relationship with the Nominee on behalf of the parish (and especially the Vestry) and the larger church. This requires a commitment of time, energy, sharing of themselves, as well as a commitment to ask difficult and challenging questions of one another. In the course of their work they may enter spiritual depths in their life as a group and individually that will reward and challenge them.

Parishioners accepting the commitment to serve on a PDC may ask, "What do I have to offer? Who am I to judge?" The simple truth is that we depend on every member's gifts and discernment. The basic qualifications are within each of us in our life experience and in the Christian commitment we offer. This task calls for a willingness to be open, honest, and candid in the context of a caring community, to both support and confront the Nominee. While the principal purpose lies in helping the Nominee clarify a call, the process will result in a mutual journey for all involved.

The Nominee will ask himself/herself: "Is ordained or lay ministry the form my ministry should take?"

The PDC and ultimately the Vestry and Rector/Vicar will ask:

- A. "Does this individual sufficiently understand the ministry of all baptized persons, and appreciate the opportunities for his or her lay ministry?"**
- B. "Does ordained ministry seem to be the leadership role to which God is calling this person?"**
- C. "Can we in good faith send this person to become an ordained leader of other congregations?"**
- D. Can I see this person being MY deacon or priest?**

Some Qualities to look for in Aspirants in the Discernment Process

Spirituality

Does this person have:

- ◆ Clearly articulated personal commitment to Christ
- ◆ Clearly articulated sense of call to leadership in ministry
- ◆ Rule of life that includes regular/daily practices of private study and prayer; regular interaction with Spiritual Director
- ◆ Clearly articulated understanding of their own giftedness

Ministry Experience

Does this person have:

- ◆ Demonstrated leadership gifts and a passion for leading and equipping God's people
- ◆ History of being used by God to lead others to Christ? For example:
- ◆ Teaching experience: taught Bible studies, Sunday School
- ◆ Pastoral experience: visitation of sick, bereaved, lapsed
- ◆ Administrative experience: Vestry, Stewardship
- ◆ Program experience: youth ministry, Sunday School program development

Education

Does this person have:

- ◆ Associate's Degree (preferred, but not required for vocational diaconate)
- ◆ Bachelor's Degree (preferred, but not required for priesthood)

Maturity

Does this person have:

- ◆ Spiritual and emotional maturity
- ◆ Ability to relate well to people
- ◆ Ability to listen and is able to control need to "have the last word"

Confidentiality

In the Discernment Process, confidentiality is crucial because we are dealing with very sensitive issues in peoples' lives.

What should be kept confidential?

- ◆ **all proceedings of the committee meetings**
- ◆ **personal spiritual journeys of the members**
- ◆ **individual evaluations**
- ◆ **vote tallies**

When asked by a member of the congregation, "How are things going with the PDC?" A member might respond: "We are enjoying getting to know one another and working together." If further questions ensue, this may be an appropriate response: "I appreciate your concern, but since our work is confidential, I prefer not to talk about it. I hope you understand."

After the PDC Report has been filed with the Rector/Vicar, Bishop Holcomb, COM Rep, Diocesan Office and Chair of Commission on Ministry, it would be wise to shred individual evaluation forms

Information about someone may be public or private. For example: If a parishioner asks how many children the Nominee has, it is OK to say "Two". This is public knowledge. If a parishioner asks if the Nominee has ever suffered from depression, this is private knowledge. If there is any doubt whether an issue is in the private or public domain, then treat the information as confidential.

Under no circumstances should a member of the committee take it upon himself or herself to discuss with the Nominee any problem or observation which has arisen during a meeting where the Nominee is not in attendance. Such observations are only shared with the Nominee within the committee meeting or by the convener if so directed by the committee as a whole.

Should any pastoral or ethical concerns arise in the course of the PDC meetings, the Chair should inform the Rector/Vicar.

The work by the PDC culminates in a final report arrived at by diligence in the discernment process and arduous prayer. Members have a sustained and intimate contact with the Nominee and develop a personal bond with him/her. Openness, candor and support are encouraged, but it is also important to balance these qualities with objectivity. It is difficult to say "no" to ordination and "yes" to lay ministry because this sounds to a Nominee like a rejection of his or her perceived gifts. If the Nominee is redirected, the PDC affirms the Nominee's other ministries, and its members deal with their feelings about the outcome. It is important to understand that the Rector/Vicar, Vestry or Bishop may choose to accept or to modify the recommendation of the PDC.

❖ The Parish Discernment Committee RECOMMENDS; the Rector/Vicar, Vestry and Diocese ultimately have the canonical responsibility to DECIDE on behalf of the

church whether to affirm the call of the Aspirant or not.

General Suggestions for all meetings:

*It is important to **open and close your meetings with prayer**, always mindful that this is a spiritual quest. You may wish to consider the Prayer Book as a primary resource especially pages 814-841 as well as various scriptures including I Corinthians 12:1ff, Ephesians 4:7,11-16; Romans 12:1-8; Acts 4:13.*

Throughout this process evaluations are most helpful, and we suggest that you use some method of evaluation at the end of each meeting. A simple method is to use newsprint or some other tool and gather information about what was good and what was not so good, or what helped and what hindered.

*Although the recorder will gather responses to the questions explored during PDC meetings **each member of the PDC will be asked to evaluate not only the Nominee, but also the work of the PDC itself.** (For example: "How are we doing as a discernment committee?") Each member might wish to keep personal confidential notes for future reference.*

Build a climate that encourages risk taking, trust, vulnerability, sharing, caring and discourages judgment, competition, and advice. Discuss the issue of confidentiality at the first meeting.

6. The COM Rep reads pp. 543 & 544 (examination of deacons) or 531 & 532 (examination of priests) in the Book of Common Prayer; discussion as to what is involved in the ordination and ministry of a deacon or priest.

7. Time for questions

8. An agreeable meeting place and meeting agenda is set up. Weekly meetings are the norm and faithful attendance is essential. Please allow about 2 hours per meeting.

9. Members of the PDC and the aspirant's spouse are asked to prepare a brief summary of his/her own faith story for sharing at the next meeting.

10. The aspirant is given the following assignment for homework:

Prepare a comprehensive "spiritual resume" which should include: his/her family background, church background, education, job experience, significant (high and low) spiritual experiences, how he/she sees her call to ministry, his/her intended plan for service in his/her church now and after ordination if it occurs, identification of his/her gifts as he/she sees them, and his/her expectations for the future (ICS, seminary, whatever), and information about any relevant medical or psychological issues. **The aspirant is instructed to bring this spiritual resume to the next meeting along with copies for every PDC member.**

11. COM Rep, PDC members and the aspirant share phone numbers and email addresses

12. Conclude with prayer, after which the aspirant is excused from the meeting. The PDC may wish to meet briefly after the Aspirant leaves to discuss any concerns, insights, etc. **This brief meeting would not normally include the COM Rep.**

13. HOMEWORK TO PREPARE FOR THE NEXT MEETING:

- a. Please read, mark, learn, and inwardly digest this entire document.
- b. PDC MEMBERS and ASPIRANT'S SPOUSE: Prepare a brief summary of your faith story to share aloud at the next meeting.
- c. ASPIRANT: Prepare a comprehensive "spiritual resume" which includes: your family background, church background, education, job experience, significant (high and low) spiritual experiences, how you see your call to ministry, your intended plan for service in your church now and after ordination if it occurs, identification of your gifts as you see them, and your expectations for the future (ICS, seminary, whatever), and information about any relevant medical or psychological issues. **Please bring this spiritual resume to the next meeting with enough copies to give one to each PDC member.**

Meeting #2

In Attendance: PDC, Aspirant (and Spouse)

Begin with prayer

Everyone shares their prepared faith stories, including a summary of his/her spiritual resume by the Aspirant as assigned in Session #1.

Aspirant is asked to briefly summarize how he/she understands the gospel message; if time permits and the committee is so inclined, the aspirant may be asked to demonstrate how he/she might share this message with some or all of the following people:

- 1) a child under 10
- 2) an elderly person near death
- 3) a teenager
- 4) a person of another faith tradition

The aspirant distributes his/her prepared spiritual resume as assigned in Meeting #1. PDC members and aspirant's spouse are asked by PDC leader to read aspirant's spiritual resume carefully in preparation for the next meeting, and note any questions which should be discussed

Close with prayer. The Aspirant and spouse are excused from the meeting. The PDC may wish to meet briefly after the Aspirant leaves to discuss any concerns, insights, etc.

Meeting #3

In Attendance: PDC, Aspirant (and Spouse)

Begin with prayer.

Ask the spouse how he/she feels about being married to an ordained person.

Suggested questions for spouse:

How do you feel about your spouse entering into the discernment process toward ordained ministry?

How do you see yourself involved in your spouse's ministry?

How would YOU identify your spouse's gifts?

Discussion of the aspirant's spiritual resume

Suggested questions for discussion:

What does the aspirant see as his/her gifts? How do you view and use the Bible?

Do you have a rule of life for your spiritual growth?

Discuss any issues of concern or need for clarification arising from the aspirant's spiritual resume.

Discuss with the aspirant and spouse their understanding and practice of stewardship as it relates to time, money and talent.

Invite aspirant and spouse to share their marital history and current family issues.

Remind the spouse that he/she will not attend the next PDC meeting. Close with

Prayer. The aspirant and spouse are excused from the meeting.

The PDC may wish to meet briefly after the Aspirant leaves to discuss any concerns, insights, etc.

Meeting #4 ***In Attendance: PDC, Aspirant***

Begin with prayer

The PDC should review with the aspirant the Work Learning Agreement

What is going well?

What is especially challenging?

What questions arise from these ministry experiences?

Are there areas of ministry that have not been explored and how can this be facilitated? What has been your ministry experience outside the walls of the church?

What have you learned about leadership from your work in the congregation and beyond?

Time permitting the aspirant should be excused and the following questions should be addressed (otherwise these questions should be addressed in a subsequent meeting):

Have we been able to adequately observe the aspirant in ministry? And/or

Have we been able to reflect with the aspirant about their ministry enough to be satisfied of their leadership and servant qualities?

What can we affirm about their ministry in the parish and beyond?

What concerns are we left with about their fitness for ordained ministry?

Close with prayer. Remind aspirant that he/she will not attend the next PDC meeting.

Meeting #5

In Attendance: PDC members only

Open with prayer

At this meeting the PDC should take all the time it needs to assess and evaluate the aspirant based on his/her spiritual resume and their previous meetings. Review any of the significant insights or concerns that might have emerged. If there are lingering questions which the PDC feels must be answered, articulate them for the subsequent meeting with the aspirant.

The following questions might be discussed:

Does the aspirant demonstrate a servant's heart? Does the

aspirant demonstrate leadership skills?

Are there subjects the aspirant seems to want to avoid?

Did the aspirant become overwrought over anything? What and why? Would the aspirant be a good pastor?

Is the aspirant touchy or defensive?

Does the aspirant have any traits which would make him/her an unsuitable ordained representative of the Episcopal Church?

Is there anything of a spiritual nature that might cause you to doubt or affirm his/her suitability for ordination?

Do you discern any ulterior motive (financial issues, self-importance, pride, political agenda, etc.) that the aspirant might have for wanting ordination that he/she has not shared?

Chair distributes Parish Discernment Committee Member's Individual Evaluation forms (see pages 10 & 11) for the PDC members to look over in preparation for filling out those forms for next week's meeting with the aspirant. Members discuss anything about the forms that they do not understand. They should be reminded that it is the PDC's job to offer an opinion as to whether the aspirant should continue in the process of ordination to the priesthood or diaconate, or continue serving the church as a lay minister.

Note: The PDC may make a recommendation which has qualifications, *such as*: "recommend the aspirant continue with the ordination process as long as he/she prepares a plan for paying off his/her extensive student loans," **or** "recommend the aspirant continue with the ordination process only if his/her spouse gets on board with it" **or** "recommend the aspirant continue with the ordination process only if he/she gets more involved in this church," etc. **OR**

"The PDC does not recommend the aspirant continue with the ordination process because: he/she does not in our opinion have the depth of spiritual commitment...or the theological understanding...or the clear sense of divine call...necessary in someone seeking ordination."

Remind everyone that the next meeting is very important. It involves meeting with the aspirant for the last time before the final recommendation is made.

Close with Prayer

Meeting #6 ***In Attendance: PDC and Aspirant***

Open with Prayer

This meeting offers a time for careful reflections, sharing PDC members' positive observations as well as concerns with the aspirant and giving the aspirant an opportunity to consider and respond to them.

When the Chair believes that all issues have been adequately discussed or time is critical, he/she will excuse the aspirant from the meeting.

PDC members will discuss anything further that they feel must be discussed among themselves, and then they will each fill out an Individual Evaluation (page 10 & 11)

and hand it in to the Chair who will prepare a statement of recommendation based upon the forms received from PDC members.

When the Chair has prepared a Report of the Parish Discernment Committee (page 12), a copy of it will be sent by email to each PDC member for a "yes" or "no" vote, with opportunity to make changes if necessary. This should be returned to the Chair within 24 hours of receiving it.

The Chair will put together a final recommendation report and send each PDC member a copy, and make a copy to be given to the aspirant at the final meeting. Each member is asked to bring his/her copy of the final recommendation report to the final meeting.

Note: The PDC may agree to allow the Chair extra time to complete the final recommendation report for the 7th and final meeting mindful that the aspirant is likely to be anxious about this particular part of the process.

Close with Prayer

Meeting #7 ***In Attendance: PDC members and Aspirant***

Open with Prayer

The PDC will share its final recommendation with the aspirant. If the Chair wishes to include a brief explanation of it, he/she may do so. If there are concerns on the part of the aspirant these should be taken to heart, though this is not necessarily a time to reconsider the recommendation.

The aspirant is to be encouraged to continue in his/her current ministry, whether or not he/she has received the recommendation hoped for.

Close with Prayer

The Chair will send copies of the PDC recommendation to the Rector, Bishop Holcomb, the COM Rep, COM Secretary at the Diocesan Office, and the Chair of the COM.

Confidential

Parish Discernment Committee Member's Individual Evaluation

Your Name: _____

Nominee's Name: _____

How long have you known this Nominee and in what contexts have you known the nominee?

It is a high calling to serve God and the church in any intentional ministry, either as a Lay Person or in Holy Orders. The Nominee, Vestry and Diocese share in discerning this Call. The following information, giving your thoughts and impressions, will assist in this process. Please answer prayerfully and to the best of your knowledge. Circle your answer. 1 = poor, 3 = adequate, 5 = superior.

◆ Can he/she be described as a person “with evident gifts and fitness for ordination” ? 1 2 3 4 5

◆ Does this person exhibit demonstrated skills as a leader? 1 2 3 4 5

◆ Does this person exhibit emotional maturity? 1 2 3 4 5

◆ Does this person have a stable family life? 1 2 3 4 5

◆ Does this person have stable relationships? 1 2 3 4 5

◆ Does this person have a stable employment history? 1 2 3 4 5

◆ Does this person have a regular and mature prayer and worship life? 1 2 3 4 5

◆ What experience does this person have in lay ministry and service within the church **and** outside the church?

◆ After hearing this person share his/her spiritual journey and desire for a more intentional ministry, briefly state your understanding of this person's spiritual journey and desire.

◆ Would you want this person to serve and represent you, your parish and the Episcopal Church as an ordained leader? _____ Yes _____ No

What do you consider to be three positive and three negative character traits of this person?

Positive: _____

Negative: _____

Can you in good conscience support this person in his or her journey toward ordination??
_____ Yes _____ No

Please explain the reasons for your response above:

Other Comments:

Report of the Parish Discernment Committee

Re: _____
(Nominee's Name)

To: _____
(Parish Name and Location)

The Parish Discernment Committee recommends as follows:

Recommend for Lay Ministry *(please add specific recommendations if possible)*

Recommend continuing exploration toward the Vocational Diaconate

Recommend continuing exploration toward the Priesthood

Recommend Other Alternatives at this time *(please be specific)*

Please attach a narrative explaining your recommendation using these questions as guidelines (including additional information/impressions as deemed appropriate)

1. What is the Nominee's understanding of the Christian ministry?
2. Describe the current ministries of this person.
3. In what ways do you see/experience the Nominee as one who is growing in the Christian faith?
4. What further growth is needed, and does this Nominee have the capacity to achieve such growth?
5. Describe this person's emotional health.
6. Describe this person's leadership skills.
7. In what ways does this person envision his/her diaconate/priesthood?

Signed: _____ Date: _____
Chair of the Parish Discernment Committee

Number of Concurrences _____ Number of Dissents _____ Number of Abstentions _____

(If possible please attach comments explaining dissents or abstentions)

Send copies of this Report to: Rector/Vicar, Bishop Holcomb, COM Rep, COM Secretary at Diocesan Office and Chair of Commission on Ministry.