



Saint Charles Borromeo Seminary

School of Diaconal Formation

Student Handbook

Pursuant to the
*National Directory for the Formation, Ministry, and Life
of Permanent Deacons in the United States*
Promulgated by the USCCB, February, 2005

Revised: April 2, 2020

St. Charles Borromeo Identity Statement:

Saint Charles Borromeo Seminary exists to be, “in its own way, a continuation in the Church of the apostolic community gathered about Jesus, listening to his word, proceeding toward the Easter experience, awaiting the gift of the Spirit” (cf. *Pastores dabo vobis*, n. 60) as it prepares priests, deacons and other missionary disciples.

St. Charles Borromeo Mission Statement:

Saint Charles Borromeo Seminary forms priests to be shepherds after the heart of Jesus Christ, and permanent deacons, religious and lay men and women for various forms of ministry, service, and discipleship.

St. Charles Borromeo Leadership Statement:

The Seminary carries out its mission under the leadership of the Archbishop of Philadelphia and a Board of Trustees, guided by the Magisterium of the Catholic Church and her Supreme Pastor, and in accordance with the directives of the Apostolic See and the United States Conference of Catholic Bishops.

St. Charles Borromeo Vision Statement:

Saint Charles Borromeo Seminary will form humble servants, heroic leaders, and holy priest, deacons, consecrated religious and laity.

Institutional Goals:

1. Within the context of its mission, Saint Charles Borromeo Seminary seeks to serve the Archdiocese of Philadelphia, partner dioceses, institutes of consecrated life, societies of apostolic life and contemporary ecclesial movements.

2. Saint Charles Borromeo Seminary forms priests, deacons, religious and lay men and women who encounter Jesus Christ in the Church’s Sacraments, who deepen their friendship with Him in liturgical and personal prayer, and who grow in this relationship with Him through the study of His teaching.

3. Seminary graduates are inspiring workers and effective evangelizers who share with every person the Gospel of Jesus Christ through the Church’s worship, preaching, catechesis, and charitable works.

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ABOUT THIS GUIDE

Always check for interim revisions on the St Charles Borromeo Website, School of Diaconate Formation, Forms and Evaluations Page, for any changes since the revision date on the cover [www.scs.edu].

PERMANENT DIACONATE FORMATION

The School of Diaconal Formation's primary purpose is implementing the four-fold dimensions of diaconal formation (human, spiritual, intellectual, and pastoral) of potential candidates for the diaconate of Jesus Christ in the Roman Catholic Church. Its guiding focus is the example of Jesus Christ, who came "not to be served but to serve, and to give His life as a ransom for the many" (Mark 10:45).

In theological instruction and pastoral education, the School of Diaconal Formation seeks to engage men in a process of reflection on the issues of life, to provide a better understanding of the Gospel message, a clear awareness of the historical development of the Christian faith and to impart a sensitivity to the human concerns and spiritual demands faced by contemporary men and women of faith. A particular emphasis is strengthening the man's ability to explain and articulate the Catholic faith to members of the Catholic community and to men and women of other Christian traditions and other faiths. Through integration of the four components of formation the School of Diaconal Formation has these primary goals:

- The fostering of Human Formation consistent with the attainment of the maturity demanded for ordained ministry as a Roman Catholic deacon serving in the Archdiocese of Philadelphia.
- The deepening of Spiritual Formation to sustain a lifetime of diaconal service and to advance that continual conversion of mind and heart so necessary for every baptized member of the Church and especially to be expected of its ordained deacons.
- The sharpening of Intellectual Formation effectively to assimilate a graduate, professional theological education consonant with the ability faithfully to grasp, represent, and apply the Church's Tradition as an ordained deacon.
- The broadening of Pastoral Formation to develop the specific capacities for ministerial and public leadership required for diaconal service.

PATH OF FORMATION

The *National Directory for the Formation, Life and Ministry of Permanent Deacons in the United States [ND]* describes four distinct but related levels in the formation of a man called to serve as a deacon: those of inquirer, aspirant, candidate, and deacon in post-ordination. The four stages are closely linked and form one journey of faith in living out a life that models Christ as Servant. In each path, the human, spiritual, intellectual and pastoral dimensions of a man's life are developed so as to achieve progressive growth and maturity in the exercise of ministry. The Inquiry period and post-ordination period are under the Archdiocese of Philadelphia Vicar for Clergy. Aspirancy and Candidacy are the formation elements that have been placed under the care of the School of Diaconal Formation at St. Charles Borromeo Seminary

ASPIRANCY

Admission as an Aspirant means that you have been admitted to a year-long preparation for study and instruction.¹ During this year, you will be introduced to diaconal spirituality and ministry, challenged to grow in self-awareness, and take part in supervised pastoral experiences. According to the *National Directory for the Formation, Ministry and Life, of Permanent Deacons in the United States*, “The aspirant path is primarily a time to discern the capability and readiness of an aspirant to be nominated to the bishop for acceptance as a candidate for diaconal ordination” (ND, 182). The goal of this year of discernment is “to enable the aspirant to demonstrate the possibility of a diaconal vocation and an appropriate level of readiness for eventual selection into candidate formation” (ND, 183); the emphasis will be on determining and helping to develop your “spiritual readiness, intellectual capacity, and pastoral abilities” (ND, 185) for the ministry of Deacon.

Discernment for the diaconate begins on a personal level with an intuition that you are being called and then quickly moves to a community level—your family, your pastor, your formation team, and the Archbishop are all part of the process. In addition, the community that we form together—with its own times of gathering and prayer—is an essential component of your listening to the voice of God. The formation team is here to support and assist you in our journey; this is not a competition and there is no “right” to ordination. Certain attitudes and approaches that may have served you well in academics or business have no place here.

¹ Similar to a propaedeutic or basic instruction year

Since many permanent deacons are married, it is important to know that the Church places great value on the input of the aspirant's wife and family in the discernment process. An applicant cannot be considered without his wife's informed, written consent at each step. The same is true of the applicant's pastor, who will be asked to recommend the applicant from his parish.

It is the Church who determines that the time is right for the applicant given his family and work circumstances and the needs of the Archdiocese. While an individual may feel a strong personal call, it is important to keep in mind the ecclesial nature of the call to ordained ministry.

All ministry flows out of the gifts of the Holy Spirit. These gifts are given to the People of God not for the benefit of the individual minister but for the benefit of the Church. As a result, any discernment of gifts and charisms must involve the ecclesial community. This is especially true for ordained ministries of the Church. An individual who presents himself for ordination to the diaconate is accountable to the Church, who mediates—confirms—his vocation (ND, 152).

The Archbishop, as Chief Shepherd of this Archdiocese, oversees all ministries and programs. Informed by those he has appointed,² he will make the final decisions regarding the admission of an aspirant to candidacy, continuation in candidacy, installation into the ministries of lector and acolyte, and finally ordination. As the National Directory states:

In the formation of deacons, "the first sign and instrument of the Spirit of Christ is the proper Bishop [...]. He is the one ultimately responsible for the discernment and formation" of aspirants and candidates, as well as the pastoral care of deacons. He discharges this responsibility personally, as well as through "suitable associates" who assist him—the director of deacon formation and the director of deacon personnel (ND, 266).

Aspirancy is a time when the Church will assist you in determining if you have a vocation to Holy Orders as a permanent deacon or rather for service in lay ministry in response to our universal call to holiness. It is important to examine your prayer life and grow in your knowledge of how Christ speaks to you through the movement of the Spirit within. The source of all true progress in ministry and holiness consists of increased attention and fidelity to the action of the Holy Spirit.

² Those appointed by the Archbishop to inform him of your progress include: the Rector of St Charles Borromeo Seminary, the Dean of the School of Diaconal Formation, the Formation Team, and your pastor.

CANDIDACY:

Admission as a candidate means that the petitioner has been invited by the Archbishop to enter a time of formal preparation for ordination that requires 5 years of theological and liturgical formation. Enrollment among the candidates for the diaconate does not constitute any right necessarily to receive diaconal ordination. The goal is to select men who measure well against a standard of excellence. This does not merely mean academic excellence, but it does mean that any man admitted to the formation process will display ministerial gifts and potentialities for excellence which are inherently diaconal. Admission as a candidate is not to be based on meeting some minimal qualifying threshold, but rather admission is to be based on the display of rich talents needed by the Church of Philadelphia for its mission.

In moving from Aspirancy to Candidacy, candidates transition from a period dedicated to personal reflection into a period of preparation and training for public ministry. Therefore, while much of Aspirancy was focused on meeting the individual applicant's needs as he discerned if indeed he was called and ready, Candidacy is focused on making sure the individual is equipped to meet the needs of those he will serve. This change will make a material difference in the pace, intensity, subject matter and nature of the classes, workshops and pastoral experiences. While fraternal spirituality and prayer will continue to be a priority, the development of proficiencies and the gaining of knowledge will become of greater importance.

During Candidacy, the Dean of the School of Diaconal Formation and the Formation Team are responsible for providing appropriate theological education and practical training to insure candidates have adequate opportunity to acquire the necessary level of competency in the threefold charisms of word, sacrament, and charity.

Each year during Candidacy, Dean of the School of Diaconal Formation and the Formation Team, have the responsibility of reviewing each candidate describing his achievements and limitations in the areas of human, spiritual, intellectual and pastoral development. Feedback from this review can be shared verbally with the candidate during the annual formation interview or in other meetings as required.

Admission to Candidacy

In order to advance to the candidate phase from the aspirancy phase, the petitioner must have completed the following steps:

- Aspirancy period of discernment is completed
- Interview with Director or Member of Formation Team (wife and children are included if married with children)
- Letter presented to the Archbishop by the Aspirant requesting admission to Candidacy (handwritten and signed)
- Consent of Wife if married (handwritten and signed)
- Evaluation and endorsement by the candidate's Pastor
- Evaluation and endorsement by the candidate's Mentor
- Safe Environment Documents are up to date:
 - Safe Environment Part I
 - Safe Environment Part II
 - FBI Criminal Record Check
 - PA Criminal Record Check
 - Child Abuse Record Check
- Proof of financial stability
- Positive recommendation by the Formation Committee and the Dean of Formation
- Endorsement by the Rector of St. Charles Borromeo Seminary
- Language proficiency and academic assessment
- Call to Candidacy by the Archbishop

Institution to the Ministry of Lector

After completing one year of Candidacy, candidates apply to be instituted into the Ministry of Lector. The process for acceptance into this ministry is as follows:

- Completion of the first year of theological studies and formation
 - Completion of the Practicum on Ministry of the Word
 - Passing the *Lector Proficiency Assessment* in Dec/Jan of Year I ([Cf. App. XI](#))
 - Letter presented to the Archbishop by the Candidate requesting institution as a Lector
 - Spousal affirmation of support for husband and consent of institution to the Bishop
-

- Evaluation and endorsement by the candidate's Pastor
- Evaluation and endorsement by the candidate's Mentor
- Safe Environment Documents are up to date:
 - Safe Environment Part I
 - Safe Environment Part II
 - FBI Criminal Record Check
 - PA Criminal Record Check
 - Child Abuse Record Check
- Positive recommendation by the Formation Committee and the Dean of Formation
- Endorsement by the Rector of St. Charles Borromeo Seminary
- Call to Lector by the Archbishop

Institution to the Ministry of Acolyte

After completing two years of Candidacy, candidates apply to be instituted into the Ministry of Acolyte. Instituted Acolytes have special duties as Extraordinary Ministers of the Altar. The process for acceptance into this ministry is as follows:

- Completion of the three years of theological studies and formation
 - Passing the *Acolyte Proficiency Assessment* in Dec/Jan of Year II ([Cf. App. XII](#))
 - Letter presented to the Archbishop by the Candidate requesting installation as an Acolyte
 - Spousal affirmation of support for husband and consent of institution to the Archbishop
 - Evaluation and endorsement by the candidate's Pastor
 - Evaluation and endorsement by the candidate's Mentor
 - Positive recommendation by the Formation Committee and the Dean of Formation
 - Endorsement by the Rector of St. Charles Borromeo Seminary
 - Call to Acolyte by the Archbishop
-

Advancement to Diaconate Ordination

The candidate satisfactory completes the following during the years of formation and each item must be duly documented in his portfolio:

- Completion of formation courses, workshops, and practica
 - Institution as Lector
 - Institution as Acolyte
 - Competency Exam passed (Oral and Written)
 - Final file audit demonstrates candidate's acceptable portfolio (complete and free of disqualifiers)
 - Completion of Ordination Retreat
 - A certificate of physical health
 - Handwritten Letter of Petition to the Archbishop;
 - Consent of wife if married (handwritten and signed)
 - Profession of Faith
 - Oath of Fidelity
 - Endorsement by the candidate's Pastor
 - Endorsement by the candidate's Mentor
 - Safe Environment Documents are up to date:
 - Safe Environment Part I
 - Safe Environment Part II
 - FBI Criminal Record Check
 - PA Criminal Record Check
 - Child Abuse Record Check
 - Proof of financial stability
 - Positive recommendation by the Formation Committee and the Dean of Formation
 - Endorsement by the Rector of St. Charles Borromeo Seminary
 - Faculties and assignment letter received from the Archbishop
-

Audit:

Prior to ordination, the Formation Office staff conducts an audit of the petitioner's records to determine the following are properly filed:

- Certificate of Baptism
- Certificate of Confirmation
- The certificate of the ministries mentioned in can. 1035
- The certificate of studies in accordance with can. 1032
- Certificate of Marriage, if the ordinand to be promoted is married

Time commitment to Formation:

| | Yearly Hours spent in Formation | |
|-----------------------------------|---|-----------------------------|
| | Aspirancy-Year I-IV | Year V |
| Academic Class Hours | 135 ³ ; Year IV 157 ⁴ | 157 |
| Academic Study Hours | 270 | 314 |
| Workshop Hours | 33 | 33 |
| Retreat Days | 3 | 8 ⁵ |
| Liturgies and Events ⁶ | 11.5; Year V 15.5 | 15.5 ⁷ |
| Spiritual Direction | 4 | 4 |
| Mentor and Review | 10 ⁸ | 10 |
| Social Ministry | 15 | 15 |
| Parish | TBD ⁹ | TBD |
| Total for Year | 478.5 and 3 day Retreat | 556.5 and 8 days of Retreat |

³ Aspirancy Year does not have homiletics, so their class hours are 90.

⁴ Second Semester year IV includes two courses on Monday and Wednesday.

⁵ Includes mandatory ordination retreat.

⁶ Includes Ordination, Lector, Acolyte, Candidacy, and Family Picnic.

⁷ Includes acolyte service for Archbishop.

⁸ Based on three meetings a semester for 1 ½ hours and Formation Interview.

⁹ The amount of time a candidate offers to his parish is to develop out of a conversation with his pastor, balancing the responsibilities of family, work, and formation. For many candidates this may mean cutting back on volunteer hours to the Parish because of the responsibility to formation. The Candidate should take every opportunity to serve at liturgy when they are fulfilling their regular obligation of Mass on Sundays and Holy Days.

RESPONSIBILITIES

Formation involves education, training, spiritual growth and, most importantly, ongoing conversion. Change takes effort and emotional energy, and learning and training take time. Those who are part of diaconal formation must realize that the preparation and training necessary for becoming a deacon demands significant time, self-discipline, and true effort.

It is expected that you will fully participate in classes (including timely completion of all reading and writing assignments), workshops, days of recollection, retreats, regular spiritual direction, and meetings with your mentor and pastor.

Pursuing your spiritual growth is equally as important as your academic work and your training for various ministries because spiritual maturity is a requirement of serving the Church as an ordained minister. Daily prayer and participation in the sacraments are necessary parts of formation and post-formation.

Liturgical competency comes from more than attending instructional workshops. It requires habitual learning; that is, proficiency and comfortability in the sanctuary derive from repeatedly serving in the sanctuary. Aspirants and candidates need to demonstrate initiative by offering their services to their pastor in various liturgical roles so that they can develop good habits of liturgical competency. They should also familiarize themselves with the layout and organization of the local parish's sanctuary and sacristy. In addition to the training workshops on liturgy, aspirants and candidates should seek direction from their pastors and mentors.

It is the responsibility of the aspirant and candidate to organize his time to balance family, employment and his studies to avoid conflicts, minimize stress on himself and his family, and continue to meet his responsibilities as a husband, parent and employee while in the program. Those asking the Church to confirm their call as deacons must be willing to actively pursue the knowledge, skills and depth of faith necessary to fulfill the deacon's call to be a minister of word, altar and charity.

Attendance Policy:

Men in formation are expected to attend all scheduled formation classes, workshops, liturgies, and events. Occasionally an aspirant/candidate may be absent from an event, workshop, or class due to illness, family emergency, or major event—if so, the Dean of Formation and if

applicable the class professor must be notified, (in advance of absence). As with your work and other things in life, you are expected to be able to make the critical decision about what constitutes a legitimate reason for missing part of your essential formation experience. As with work and other things in life, unexcused or excessive¹⁰ absences may be a cause for dismissal from the program.

If the aspirant/candidate has been assigned a liturgical role at a liturgy and is unable to attend then he is responsible for finding a replacement and informing the Coordinator of Liturgy as to the change.

Meetings with Pastor, Mentor, and Spiritual Director

During your time in formation you will be required to have ongoing regular meetings with your Pastor, your spiritual director, and your Mentor. The candidate is the person primarily responsible for his formation and as such you need to demonstrate an ability to set and keep meetings with your Pastor (regular), Spiritual Director (quarterly min.), and Mentor (quarterly min.).

Portfolio

During your time in formation, you are expected to keep a portfolio that includes: Spiritual Direction Meeting Log, Mentor Meeting Log, Mentor Meeting Notes, Ministry Participation Log, and Theological Reflection Papers.

Participation of Wives:

Wives are expected to accompany their husbands throughout all aspects of the aspirancy program. Participation is important to ensure that wives have ample opportunity to ask questions and gain a clear understanding of the diaconate before being asked to give their informed consent for the husband's continued participation.

If a spouse is unable to attend the required sessions, the matter is to be discussed with the Dean. Failure to do so, or evidence that the absences are due to lack of support for the aspirant's formation, may constitute grounds for the aspirant's dismissal.

During the Candidacy period, wives are only required to attend the Saturday Workshops

¹⁰ Two or more in a semester or habitual absenteeism over course of the program.

and Ministry Liturgies. However, their continued presence in the classroom is strongly encouraged and welcomed. On account of this, if you so desire, you can apply to the STS MA program. If accepted by the STS office, you can take the classes for credit at a discounted rate while your husband is in the diaconal program.¹¹ Guidelines for the MA program will be provided by STS.

Safe Environment Documents

As part of the application process you are required to submit the following documents:

- FBI Criminal Record Check
- PA Criminal Record Check
- Child Abuse Record Check

These documents need to be renewed every **five** years. Thus you are responsible for submitting them to the office staff when renewed (normally Year II and Year V) and every third year after ordination. Lack of these documents is prohibitive to ordination. Refer to Appendix II for more information.

Sexual Harassment Policy

Saint Charles Borromeo Seminary (“SCS”) is committed to promoting a safe and healthy environment for all members of its community. All students, faculty, staff and visitors have the intrinsic right to remain free from any form of sexual violence, sexual harassment and stalking at all times, but especially while on SCS property. SCS considers any form of sexual violence, sexual harassment and stalking, and any attempt to commit such acts, to be serious misconduct that may result in disciplinary action up to and including expulsion or termination of employment. In addition, acts of sexual violence, sexual harassment and stalking could violate federal, state and local laws, and perpetrators of such acts may be subject to criminal prosecution.

SCS’s Policy ([cf. Appendix X](#)) outlines the steps SCS takes to prevent and respond to any incidents of sexual violence, sexual harassment and stalking that occur within the campus community.

¹¹ Please note that you cannot receive credit for the Homiletics course or the Liturgical practica since they are specifically ministry focused. So you will need to take two other electives in the STS MA program.

DIMENSIONS OF FORMATION

There are three distinct but integral parts in the formation of a deacon: Aspirancy, Candidacy, and Post-ordination training. Each of these periods of formation can be divided into four elements: Human, Spiritual, Intellectual, and Pastoral.

Human Formation

Human Formation is the necessary foundation for the other three pillars of Diaconal Formation (Spiritual, Intellectual, and Pastoral/ Apostolic). Whether in Aspirancy, Candidacy or Post-Ordination Training, Human Formation¹² refers to the intentional cultivation and formation of character of the whole Human Person to his natural perfection so that he manifest in himself, as far as possible, the “human perfection which shines forth in the Incarnate Son of God.”¹³ More specifically, it is the process of attaining the highest and best of one’s human nature (virtues) and the fulfillment of that human nature as it is instantiated in this or that particular person.¹⁴

Aspirancy

The human dimension during aspirancy will focus on developing a high degree of self-knowledge and the foundations of Christian life to help the aspirant develop his confidence for diaconal ministry and an understanding of his call. It is a time to focus on analyzing the relationship between family and diaconal life as well as other interpersonal and relationship matters in order for the aspirant and his wife to assess the current state of their marriage, family life, and the consequences of his possible ordination to the diaconate on their family life. If unmarried, the aspirant’s time should be spent discerning the call to live a celibate life and balancing his relationships in a healthy manner. Aspirants who desire to advance to candidacy need to demonstrate:¹⁵

- The ability to be self-reflective and aware of his talents, gifts, and limitations
- To demonstrate the use of appropriate resources for his physical, emotional, and

¹² Human formation is distinct from “human development” which typically refers to the natural progression of stages within the human lifecycle (i.e. Piaget, Kholberg).

¹³ John Paull II, *Pastores Dabo Vobis*, 43.

¹⁴ Cf. Cameron M. Thompson. *Handbook of Human Formation: A Resource for the Cultivation of Character: Essential Foundations of the Art & Science of Human Formation for University, College, and Seminary Staff*, St Paul: Acropolis Scholars, 2014, pp. 1-10.

¹⁵ Adapted from ND “Basic Standards for Readiness”, p. 156.

spiritual development

- To take initiative in self-study and in completing assignments, setting and keeping meetings, and turning in paperwork
- To be a good listener
- To respect each person and be accepted as a participant who keeps confidences
- To be open to change through reflective growth in understanding
- To be able to express his position candidly in sharing for study and dialogue, neither intimidating nor being intimidated in doing so
- To integrate and prioritize his personal boundaries relating to family, recreation, work, ministry, and time alone
- To contribute to and utilize a support system for spiritual and human growth
- To participate collaboratively in all aspects of formation; to be cooperative, open and respectful to all who journey with him; to be receptive of insights offered by the formation personnel, his wife and family, peers, and pastors

Candidacy

The human dimension of Candidacy is aimed at further development and enrichment of the interpersonal skills and spirituality necessary for effective and responsible diaconal ministry. Emphasis is placed on developing social maturity and the ability to work collaboratively with diverse groups of people. Exercises in peer-criticism and self-criticism are included to help candidates develop a habit of authentic self-criticism in light of the Gospel as well as to increase one's ability to treat others with compassion and candor. The overall objective of this portion of the Diaconal Formation path is creating deacons who can balance family, ministry and work while responding charitably and flexibly to the shifting circumstances of parish ministry. This requires the candidates to demonstrate the ability for time management and priority identification.¹⁶

- To engage in self-reflection and assess his abilities and limitations; to conduct honest self-assessments and to help others to do the same
- To set healthy and responsible goals, maintain a healthy balance in his personal life

¹⁶ Adapted from *ND* "Basic Standards for Readiness", pp. 160-162.

and ministry, and develop positive support systems among family, friends, and peers

- To infuse a family perspective into ministerial and personal scheduling and programming
- To be flexible and assign appropriate priorities in varied circumstances
- To demonstrate dependability and trustworthiness
- To communicate with and relate to a wide variety of people
- To initiate, create and sustain a positive, collaborative relationship with classmates and all those involved in parish ministry
- To discern, set and maintain healthy and responsible boundaries in all pastoral relationships
- To recognize and work to dispel prejudices and cliques within his own life and that of the community; to network with others in challenging injustice
- To demonstrate appropriate respect, responsibility and accountability to the bishop, pastor, or their delegates; and to cooperate in the implementation of diocesan and parish policies
- To maintain personal health and care
- To demonstrate personal and professional preparedness in ministry

Components of Human Formation

Pastor's Report

As part of the evaluative process, your pastor, who witnesses your interaction with your family, the parish staff, members of clergy, and parishioners is tasked with writing an evaluation of your affective maturity and threefold ministry of word, liturgy, and charity.

Peer Evaluations

Peer evaluations are an important part of the formation process, evaluating not simply another's personality, but rather focusing upon the candidate's growth toward diaconal life and pastoral ministry. Required by the *National Directory for the Formation, Life and Ministry of Permanent Deacons*, peer evaluations ask a candidate's classmates to evaluate him from their

unique perspective, so that he can receive reflective insight from his fellow candidates regarding:

- His Christian witness (how does he exemplify and daily live out the Christian life?)
- His ability to minister to other believers within the Christian community (can he lead others to Christ?)

The peer evaluation process also allows each candidate to demonstrate their ability to assist others in self-evaluation, show integrity in values, communicate concerns, and to be responsible to the Church, helping ensure she is entrusted into the hands of well-prepared, committed and pastorally sensitive ministers.

It is helpful to keep in mind that the peer evaluation finds its proper place within the larger formation process which is primarily designed to guide the candidate and the Formation Staff in the discernment of God's will for each individual who presents himself for Sacred Orders.

DiSC® Profile Assessment

DiSC® is a personal assessment tool used to understand behavioral differences, improve communication skills and assist teamwork. This self-reporting instrument is meant to be non-judgmental and help increase your self-knowledge: how you relate to others, how you respond to conflict, what motivates you, what causes you stress and how you solve problems.

Classes and workshops

**These elements are subject to change as the program develops.*

- Understanding Self: DiSC® part I (Workshop, Aspirancy Year)
- Understanding and Working with Others: DiSC® part II (Workshop, Year I)
- Communicating with Difficult People: DiSC® part III (Workshop, Year II)
- Catholic Anthropology and Sexuality (Workshop, Year II)
- Healthy Boundaries in Ministry (Workshop, Year II)
- Deacon Panel (Workshop, Year V)

Spiritual Formation

The goal of the spiritual formation program is “putting on the mind of Christ, thereby establishing and nurturing attitudes, habits, and practices that provide a foundation for

development of an authentic and ongoing spiritual life” (*ND*, 191). This attitude should govern every aspect of a deacon’s life, his relationship with other people and the reason for his ministry. The program of Diaconate Formation seeks to help candidates to further develop prayerful attitudes, habits and practices that will enable the men to foster and enrich their spiritual lives.

The spirituality of the deacon is intrinsically related to his commitments. He is first of all married or single and must develop ways of loving God and neighbor through those commitments. If married, he must learn how to strengthen the sacramental love between himself and his spouse and to build up the family through love. It is of utmost importance that a candidate learns how to meet and balance his responsibilities to God, his family, his professional work and the Church in a way that honors them all and so that through them he grows in faith, hope and love in union with Christ and the Church.

Aspirancy

Spiritual formation during aspirancy will assist the aspirant in the ongoing process of configuring oneself to Christ. The goal of spiritual formation is to nurture attitudes, habits and practices that provide opportunity for this type of growth. Along with communal activities facilitated by the Formation Program, aspirants are expected to select a spiritual director from a list of priests who are approved by the Archbishop to exercise this important ministry.

Those in this year should be prepared to demonstrate within their spiritual life the ability:¹⁷

- To be self-reflective
- To be a good listener, respect each person, and be accepted as a trusted participant who keeps confidences
- To be open to change through reflective growth in understanding
- To express his position candidly without being intimidating or being intimidated in doing so
- To integrate and prioritize his personal boundaries relating to family, recreation, work, ministry, and time alone
- To reflect theologically on his faith experience through regular spiritual direction;
- To pray the Scriptures, meditating on the mystery of God as our Father, Son and Holy Spirit
- To fulfill a regular commitment to a pattern of personal and communal prayer through:

¹⁷ Adapted from *ND* “Basic Standards for Readiness”, p. 157.

- frequent praying of the Liturgy of the Hours, especially morning and evening prayer
- frequent participation in the Eucharist and the Sacrament of Reconciliation;
- personal prayer and reading of the Bible
- devotion to Mary and to the saints
- planning and leading communal prayer
- To ascertain, if married, the quality of his relationship with his wife and children and the need for dialogue and mutual consent to continue in formation and move forward toward ordination
- If single, to live a single lifestyle in an appropriate manner and grow in an understanding and embracing of celibacy
- To discern how God is calling him into ministry and to link, in reflection, his pastoral and personal experiences to theology – apprehending God’s presence through touching the needs of the poor or afflicted
- To articulate his relationship with God and reasons for believing he has a call to the Order of Deacons within the formation community

Candidacy

During Candidacy, the focus of the spiritual dimension evolves from discriminate practices to integration. By introducing the candidate to the theology and spirituality of work, this portion of the formation program helps the candidate learn how to sanctify, through spiritual integration, all aspects of his life: prayer, family, ministry, work, and play. This is an important pre-ordination step, without this a candidate lacks a personal understanding that diaconal life is a “state” not just an “action.” Spiritual work at this time will also provide ample opportunity for candidates to discern their vocation and gain the foundational habits, such as daily prayer, frequent participation in the sacraments, and theological reflection, to sustain their vocation after ordination.

They should be prepared to demonstrate within their spiritual life the ability:¹⁸

- To engage in self-reflection and assess his abilities and limitations
- To set healthy and responsible goals
- To maintain a healthy balance in his personal life and ministry
- To develop positive support systems among family, friends, and peers
- To be flexible and assign appropriate priorities in varied circumstances
- To participate regularly in the sacramental life of the Church
 - in the Eucharist daily or frequently
 - regular use of reconciliation

¹⁸ Adapted from *ND* “Basic Standards for Readiness”, pp. 162-163.

- to participate in ongoing spiritual formation, e.g.:
 - spiritual direction
 - retreats
 - community worship (especially the Liturgy of the Hours)
 - personal prayer
 - meditation
 - visits to the Blessed Sacrament
 - personal penance and mortification
 - devotion to Mary and the communion of saints
- To identify, affirm and critique the various Christian spiritualities operative in himself and others
- To articulate his personal expression of faith
- To integrate the wide spectrum of moral and human issues into his spiritual consciousness, prayer and ministry: human rights, sexuality, economics, peace, ecology, moral ethics, solidarity with human needs, the preferential option for the poor
- To maintain a commitment to regularly scheduled spiritual direction and to opportunities as appropriate, for physical and psychological health in consultation with a professional advisor
- To communicate and share his ministry, prayer, and formation with wife and family; to demonstrate marital chastity in conformity to the magisterial teaching on marriage and sexuality
- To balance marriage and ministry commitments
- To form a support system, utilize it, and contribute to it
- To accept the gift of celibacy and be willing to accept it if so called; to speak truthfully about the gift and demands of a celibate life

Components of the Spiritual Program

Spiritual Director

As part of the formation journey, Aspirants and Candidates are required to meet regularly with a spiritual director. His task is that of discerning the workings of the Spirit in the soul of those called and, at the same time, of accompanying and supporting their ongoing conversion; he must also give concrete suggestions to help bring about an authentic diaconal spirituality and offer effective incentives for acquiring the associated virtues. Because of all this, Aspirants and Candidates are invited to entrust themselves for spiritual direction only to trained spiritual directors of proven virtue, equipped with a good theological culture, of profound spiritual experience, of marked pedagogical sense, of strong and refined ministerial sensibility.

The *Directory* specifically mentions that the **issues of obedience and celibacy** should be explored during spiritual direction:

Each person in formation is called to a mature relationship with those in authority that includes a spirit of trust, mutual respect, and obedience. Accountability in formation is an invitation to a deeper conversion. A spirit of service to others is finally an imitation of Christ himself, who came not to do his own will but the will of his Father. Formation personnel, especially the spiritual director, should give instructions on the meaning of authentic obedience and help each participant to appreciate and practice it in his life (ND, 116).

Further, throughout the formation process, it is expedient that the candidate's spiritual director and those responsible for his formation ascertain the candidate's understanding, willingness, and capacity to accept the Church's discipline regarding perpetual celibacy not merely among those who are not married but, also, among married men who will be required to embrace this ecclesiastical discipline in widowhood or divorce (even with a subsequent annulment). Dispensations from the requirement of celibacy cannot be presumed. Continuation in ministry cannot be presumed even with the reception of the requested dispensation (ND, 116).

Spiritual Coordinator

In order to integrate the pillars of formation, a member of the Diaconal formation team is appointed Coordinator of Spiritual Formation. The role of the Spiritual Coordinator is to assist the Dean in coordinating and planning the spiritual dimension of formation and to be in communication with the spiritual directors.

Liturgy of the Hours

The Liturgy of the Hours is the common daily prayer of the Church. Aspirants and Candidates should use the four-volume set known as Liturgy of the Hours. There are several apps for phones that are helpful in the discipline of the hours (*i-breviary* and *Divine Office*). These apps should **never** be used to lead formal liturgies. At ordination, one of the promises the permanent deacon will make to the Archbishop is to pray the Liturgy of the Hours daily, specifically the hours of Morning and Evening prayer.¹⁹

¹⁹ ND, 90: "Permanent deacons are required to include as part of their daily prayer those parts of the Liturgy of the Hours known as Morning and Evening Prayer. Permanent deacons are obliged to pray for the universal Church. Whenever possible, they should lead these prayers with the community to whom they have been assigned to minister."

During the first semester of Aspirancy year, a member of the formation team will instruct the candidates on how to pray the liturgy of the hours and lead the class in prayer.

For the other years in formation, there is an optional gathering of the formation community for evening prayer in Immaculate Conception Chapel about 20 minutes prior (6:10pm) to the start of classes on Wednesday evenings. (Note: If you are unable to attend this optional gathering of the formation community Evening Prayer should be prayed individually). The various classes take turns leading evening prayer.

Classes and workshops

**These elements are subject to change as the program develops*

- Christian Spirituality and Prayer (2 credits Course, Aspirancy Year)
- LOH and the Spirituality of the Diaconate (Workshop, Aspirancy Year)
- Spiritual Direction and Discernment (Workshop, Aspirancy Year)
- *Lectio Divina, the Lector, and Liturgy of the Word* (Workshop, Year 1)

Intellectual Formation

Intellectual formation helps to provide a deeper understanding of the spiritual and human aspects of formation while also providing practical knowledge to support the development of pastoral skills (ND, 196).

Aspirancy

The goal of the intellectual dimension during Aspirancy is to help the aspirant to develop his understanding of his own call and the necessary vocabulary to discuss it. The aspirant's performance in these basic academic classes also provides strong indication as to whether the aspirant is prepared and willing to make the effort for the academic rigors of candidate formation. The aspirant should be prepared to demonstrate the ability:²⁰

- To articulate the primary teachings of the Church and discuss contemporary issues in light of this teaching
- To be familiar with the Catholic Catechism and understand its basic structure;
- To refer others to appropriate pastoral resources as needed

²⁰ Adapted from ND "Basic Standards for Readiness", pp. 156-159.

- To speak informally on Christian vocations and ordained ministry
- To experience and invite others into meaningful expressions of prayer and forms of Christian spirituality

Candidacy

In Candidacy, the intellectual dimension has two important goals: building Church related knowledge and developing competency in areas of diaconal service. This creates the need for serious classroom work and meaningful internships and practica in social and liturgical services. The course of study intensifies at this time due to the volume of information that a deacon needs to know in order to preach, teach, minister and lead God's people in prayer and action. Developing more than a "user knowledge" of Theology and Sacramental ministry requires serious study and research. The overall goal of the intellectual dimension is equipping the future deacon with the knowledge, experience, and confidence to be a reliable witness of faith in word and action for the Gospel and the Church. At the end of formation, the candidate should be able:²¹

- To articulate the foundational relationship of Scripture to the deposit of faith
- To exercise appropriate exegetical skills in the context of church tradition and the needs of the community, especially in homiletic preparation
- To explain the major teachings found in the Scriptures to adults, teens and children
- To interpret the Scriptures in harmony with the Magisterium and Catholic biblical scholarship
- To articulate the ways in which Scripture illumines and promotes his personal growth in faith and that of others
- To relate the Scriptures to his personal experience and that of others to transform and empower God's people
- To demonstrate familiarity with John Paul II's *On the Relationship Between Faith and Reason*
- To explain the relationship of Trinitarian theology to Christology and ecclesiology
- To articulate and demonstrate reverence for the revelation and presence of God in the world through prayer, liturgy, ministries, and his present circumstances
- To identify and apply these basic principles to contemporary human issues
- To apply an appreciation of the sacredness and dignity of each human person to acts of charity and justice in hospitality and welcoming, direct pastoral care, ministry to migrants and immigrants, the ill, etc.; to advocate and organize for action

²¹ Adapted from *ND* "Basic Standards for Readiness", pp. 160-182.

- To articulate an understanding of the redemptive revelation of the kingdom, the hope of the resurrection, the second coming of Christ, and his own personal readiness in his ministry to those who are dying, viaticum, funeral liturgies, and counsel to families
- To explain the Church's heritage and history and communicate the teaching of the Magisterium faithfully
- To explain these foundational images of the Church described by the Second Vatican Council, especially to adults
- To explain the place of Mary and the saints in the life of the Church and in an authentic Catholic Christian spirituality
- To reflect upon and explain the presence and the role of the Holy Spirit in the Church and world
- To teach, evangelize, preach and catechize about the foundations of the Catholic faith and doctrine, as well as convey the basic teachings of the Church faithfully and appropriately
- To interpret the meaning and value of pastoral life in light of the ecclesiology of Vatican II and to enable people to identify and share these meanings more consciously in their lives
- To explain the history and meaning of the liturgy and sacramental rites of the Church
- To use liturgical principles and documents in designing and leading learning sessions for adults as an immediate preparation for the Sacrament of Baptism, Eucharist Reconciliation, Confirmation, Marriage, Eucharistic benediction, and Christian burial; to preside during the liturgy of the word in the absence of a priest; to help plan specific liturgical rites
- To incorporate appropriate prayer experiences for different groups
- To provide authentic and credible witness in diaconal liturgical functions; to be familiar with the Church as envisioned in the RCIA and with *Study Text VI*
- To articulate a theology of diaconate, in the context of the other orders, tradition, history, the restoration at the Second Vatican Council, and the Rite of Ordination of Deacons
- To explain and teach a Catholic understanding of conscience and moral formation to individuals and groups to assist in the development of Christian consciences informed by God's word, magisterial teaching and reason
- To apply Catholic moral principles to discussion of moral and social issues of our times, including abortion, euthanasia, capital punishment, abuse, war, sexuality, and economic justice
- To enable people to make moral decisions as Catholics in fidelity to Catholic moral teaching and principles; to develop a Catholic moral attitude and conscience
- To understand that Baptism is a juridical act that incorporates one into the Church of Christ; to understand that ecclesiastical law obligates those who are baptized into the Roman Catholic Church; to demonstrate practical knowledge of who is affected by church law

- To demonstrate knowledge of the effects of Baptism of Christian faithful with emphasis on the role of the laity to demonstrate knowledge of the basic hierarchical structures of the Church, the role of religious and all vocations, and the rights and duties of Christian faithful as expressed in the various roles and structures of the Church
- To demonstrate an understanding of what constitutes the deposit of faith as handed down through Scripture and Tradition; to understand that the baptized are to proclaim the Gospel to all peoples according to each one's proper role in the Church, and in a spirit of ecumenism; to demonstrate practical knowledge of evangelization and the mandate of the Christian faithful to safeguard the ministry of the word; to understand the importance of Catholic education and its relationship to the parental role of furthering the mission of Christ
- To demonstrate functional knowledge of the sanctifying character and form of the seven ritual sacraments, the liturgy and sacramental; to understand the basic theology and essential form of the sacraments of the Church; to explain the use of sacramentals and the veneration of the saints
- To identify and understand the norms of the universal Church on the Sacrament of Matrimony so that an adequate and thorough preparation can be achieved for Christian couples in their celebration of a valid and licit marriage
- To apply the norms of the universal Church in the design and implementation of sacramental catechesis and liturgical celebration; to understand canonical requirements for sacramental ministers, liturgical form, and proper reception of the sacraments; to understand the canonical guidelines for the use of sacramental and proper observance of Sunday and holy days
- To apply the principles of rights, obligations, and interior disposition in catechizing and in ritual celebrations; to give appropriate instruction regarding rights and obligations and necessary dispensations for sacramental observances
- To understand the responsibilities of good stewardship in supporting the works of the Church in respect to gifts, church property and ecclesiastical goods; to demonstrate knowledge of criteria for responsible stewardship
- To be cognizant of penalties attached to serious transgressions in the Church, and the pastoral applications of penalties; to demonstrate awareness of the conditions and circumstances affecting the application of penalties, especially a procured abortion;
- To infuse evangelization and catechesis into all diaconal ministries
- To articulate the basic tenets of the faith using appropriate catechetical pedagogy and methodologies that address the age, psychology, and needs of those being catechized
- To demonstrate familiarity with catechetical documents; universal, national, and diocesan policies; pedagogy and methods to evaluate catechetical processes, programs, and personnel in light of these documents and policies
- To articulate his own Catholic faith while identifying with other denominations and other religious traditions

- To articulate and appreciate our Catholic roots within Judaism

Components of Intellectual Formation

Academic Honesty

Academic honesty and integrity at Saint Charles Borromeo Seminary presumes that all men in formation for the diaconate come to Saint Charles with a desire to embrace the demands of intellectual formation and study. They take upon themselves the desire to grow in wisdom and knowledge of the faith and its development. As they enter into the realm of academic life they seek to fulfill all the requirements with honesty and seek excellence in their work. Accordingly the policy of the School of Theological Studies (STS) is applicable to all phases of the Diaconate program: “Observance of total honesty in the pursuit of one’s formal studies is required of each STS student. No instance of plagiarism, cheating, or falsification of research work, examinations or academic records will be tolerated and will be grounds for dismissal from the program.”²²

School of Theological Studies (STS)

The School of Diaconal Formation as part of St. Charles Borromeo Seminary has partnered with the School of Theological Studies, which provides much of the academic component of formation. Aspirants and Candidates need to register for their classes through the School of Theological Studies. Registration is online.

Aspirants are required to take the undergraduate courses offered through the School of Theological studies for credit that are specifically designed for the Diaconate Formation Program.

Candidates are required—minimally—to register as a Diaconate Auditor through the School of Theological Studies for the courses tailored to the diaconate program. If the candidate meets the standards of acceptance for the Graduate Program and shows himself capable, he is strongly encouraged to apply for acceptance into the Graduate Program.

Master of the Arts in Theology

If a Permanent Diaconate candidate meets the academic requirements and desires to pursue a Master of Arts in Theology degree, and is accepted into the program, his enrollment in graduate courses for credit will be offered at a discounted tuition rate. This rate only applies if the candidate

²² STS Graduate School Handbook, p.5.

remains in the Permanent Diaconate program.

At the conclusion of the Graduate Program, the candidate seeking the degree is required to take and pass the Master of Arts Comprehensive Examinations (written and oral) offered by the School of Theological Studies. These Examinations are distinct from the competency examination required by the Diaconal Formation Program.

For more information on eligibility and requirements refer to the School of Theological Studies webpage.

Competency Exam

In January of Year V, a competency exam will be given. The exam entails an oral, written, and practical component. The exam will measure the ability of the deacon candidate to teach, discuss, and practice the faith in a pastoral setting. The written exam will consist of 20 to 30 pastoral questions that relate to the fields of study. The oral component will consist of a 10 minute presentation on a subject (which the candidate will receive prior to the exam) before a three person panel composed of teachers and deacons. The presentation will be followed by questions from the panel. The practical component will consist of a walk through the liturgy [approx. 30 min.] with the deacon candidate demonstrating they know the role of the deacon. The candidate needs to pass all three portions of the exam to be recommended for ordination.

If the candidate fails either portion of the competency exam, he will be given a chance for a retake. The retake will involve a new panel composed of the Dean of Formation and members of the Formation Team. A second failure is grounds for dismissal from the program. The entire Formation Team will review second failures.

Classes and Workshops

Note that the academic calendar is set by the School of Theological Studies As well as class time. Currently, Classes meet regularly on Monday Nights from 6:30pm to 9:30pm in Vianney Hall at St. Charles Borromeo Seminary except for the homiletics practica which meet on Wednesdays (roughly every other Wednesday) at parish sites throughout the diocese. The Liturgical Practicum normally meets every Monday during the Fall semester of Year V. **These elements are subject to change as the program develops.*

Aspirancy Year

Commented [DR1]: Need to insert what the practical component consists of

- Courses
 - 270 Introduction to Philosophy
 - 294 Catechism of the Catholic Church
 - 208 Christian Spirituality and Prayer
- Workshops
 - Theology of the Diaconate and Formation
 - LOH and Spirituality of the Diaconate
 - Spiritual Direction and Discernment
 - Introduction to Liturgy
 - Understanding Self: *DiSC*[®] part 1

Year 1

- Courses
 - 501 Foundational Course in Sacred Scripture
 - 601 Foundational Course in Systematic Theology
 - Introduction to Homiletics and *Lectio Divina* (Spring Semester only)
- Workshops
 - *Lectio*, the Lector, and the Liturgy of the Word (Lector Practicum)
 - Old Testament Theology I
 - Understanding and working with others: *DiSC*[®] part II
 - Old Testament Theology II
 - Liturgy of the Eucharist and Eucharistic Theology

Year 2

- Courses
 - 541 Epistles of St. Paul
 - 502 Synoptic Gospels
 - Homiletics Practicum (Both Semesters)
 - Workshops
 - Catholic Anthropology and Sexuality
 - Divine Office
 - Healthy Boundaries in Ministry
-

- Introduction to Canon Law
- Acts of The Apostles

Year 3

- Courses
 - 602 Christology
 - 801 Church History
 - Homiletics Practicum (Both Semesters)
- Workshops
 - The Liturgical Year
 - Liturgies of Holy Week
 - Catholic Theology of Feminism
 - Pastoral Care of the Sick/ Acolyte Practicum
 - The Liturgy and Theology of Holy Orders

Year 4

- Courses
 - 603 Theology of the Church
 - 606 Theology Grace and Sacraments
 - 701 Morality
 - Homiletics Practicum (Fall Semester)
- Workshops
 - RCIA
 - Marriage: Liturgy and Sacrament
 - Baptism: Liturgy and Sacrament
 - Communicating with Difficult People: *DiSC*® part III
 - Sacramental Canons

Year 5

- Courses
 - Liturgical Practicum (Fall Semester, every Monday)
 - Homiletics Practicum (Both semesters)
 - STS 539 Johanne Literature
- Workshops

- Pentateuch
- Preparation for Comprehensive Exam and Ordination
- Sacred Music
- Deacon Panel: Transitions to Ministry

Pastoral Formation

The ministry of charity is most characteristic of the deacon. In fact, with sacred ordination, the deacon is constituted a living icon of Christ the servant within the Church. Therefore, as he conforms his life to Christ the Servant, making himself a generous and faithful servant of God and of those in need, especially among the poorest and those most suffering, he helps to shape the vitality and genuineness of the exercise of the corporal and spiritual works of charity in the life of the believing community” (ND, 147).

Aspirancy

Although there will be a higher concentration on pastoral formation during candidacy, the aspirancy year will focus more on the relationship the aspirant has with his pastor, parish staff, and fellow parishioners. It is expected that the aspirant will be involved in one or more parish ministries such as RCIA, Pre-Jordan, Pre-Cana, Parish Council, and serve as a Lector or Extraordinary Minister of Holy Communion.

During aspirancy there is an attempt to develop and understand the aspirant’s gifts for the threefold ministry of Word, Liturgy and Charity and his capacity to make a lifelong commitment to these ministries. By introducing the aspirant to the realities of the ministerial life, pastoral formation provides information and time for the aspirant and his spouse to consider carefully the impact of having diaconal and pastoral ministry as part of their family’s priorities. The aspirant should be able to demonstrate the ability:²³

- To name appropriate theological resources useful to ministerial study and service
- To communicate effectively in spoken and written word
- To effectively use different cultural communication patterns whenever appropriate, and to use and guide others to appropriate multicultural resources
- To discern how God is calling him into ministry and to link, in reflection, his pastoral and personal experiences to theology – understanding God’s presence through touching the

²³ Adapted from ND “Basic Standards for Readiness”, pp. 156-159.

needs of the poor or afflicted; to be an advocate for people in need and a facilitator of the community's resources in response to human needs

Candidacy

Pastoral formation during the years of Candidacy seeks to broaden the candidate's experience of ministry in the sanctuary and in the area of social justice. The service of Charity and service at the altar may be either parish or community based and may be done in conjunction with his Deacon Mentor.

Liturgically, the candidate is asked to fulfill his role in the instituted ministries (Lector and Acolyte) as often as permitted by the pastor, in addition to regularly serving at Mass. Candidates should also become familiar with the organization and layout of the parish sacristy and the names of the liturgical books and vessels. Candidates should show initiative in developing good habits of liturgical competency by directing questions to their mentor, members of the Formation Team and their pastor.

Each Candidate is required to become involved in twelve hours of service in 3 different summer social justice ministries during their term of formation so that they develop a better sense of the breadth of the needs in their community. At the end of formation, the candidate should be able:²⁴

- To use theology as a help to analyze pastoral situations for an understanding of God's presence and will as articulated in Scripture, Tradition, and the magisterial teaching of the Church
- To demonstrate empathy in ministry, applying religious psychology and sociology
- To locate, select, and use appropriate sources for specific pastoral situations
- To reflect theologically in an interdisciplinary way, using psychology, sociology, and cultural and theological disciplines in understanding issues confronting societies
- To employ good verbal and non-verbal communication skills; to be an empathetic, active listener, providing feedback and withholding and making judgments appropriately
- To express himself succinctly in a well-ordered and logical way, conveying his feelings and views yet remaining open to differing views with tolerance
- To discern the issues involved in conflict and promote appropriate resolution; to provide behavior-focused feedback
- To motivate and lead groups to set agendas collaboratively, manage time, set goals and make decisions through consensus; to empower others with leadership skills
- To build groups of solidarity, cooperation, and trust through partnership and teamwork

²⁴ Adapted from *ND* "Basic Standards for Readiness", pp. 160-182.

- To speak in a clear, well-ordered, logical way; to use a variety of techniques and methods to support oral presentations
- To demonstrate multicultural sensitivity; to provide appropriate spiritual and physical response
- To not act beyond his level of training in each pastoral care situation; to know when, how and to whom appropriate referrals should be made
- To apply appropriate human development principles in preaching, programming and counsel
- To utilize appropriate models of faith formation in preaching, programming, and counsel
- To identify, articulate, and foster personal communal conversion experiences
- To demonstrate regular commitment to a pattern of personal prayer and to support others' growth in prayer
- To appreciate, understand and include groups and/or individuals with physical or developmental disabilities in a variety of pastoral programming and activities, especially in Eucharistic liturgies and religious formation
- To be empathetic, genuine, and respectful; to maintain confidentiality and objectivity; to apply basic counseling skills
- To demonstrate personal awareness and response to the needs of particular cultural/racial/ethnic communities
- To incorporate cultural expression of faith into diaconal preaching, service, and prayer experiences
- To utilize all types of media resource to recruit and facilitate ministerial leaders
- To demonstrate patience and sensitivity in communicating with and relating to staff, families, and organizations
- To apply appropriate managerial principles and administrative skills to design, implement, and coordinate programs; to employ needs assessment and analysis; to formulate mission statements, goals/objectives, strategies, and evaluation methods
- to prepare and monitor budgets; to organize tasks by priority and organize and manage his time in accord with ministry requirements; to delegate responsibilities, including authority to act; to recognize stress and select methods to respond
- To set achievable performance goals; to supervise appraisals
- To use media and technology
- To establish prudent and appropriate boundaries for interpersonal conduct, especially with women and youth
- To effectively proclaim the Gospel; to be recognized at the altar as the sacrament of Jesus, the Deacon-Servant, in the midst of the community, and as herald of the word, sanctifier in liturgy; and advocate for the poor as minister of charity and justice

- To witness to Christ in living, giving, and empowering ways; to articulate his call to diaconate as vocation; to identify, call forth, affirm, and support the gifts and talents of others
- To help others to grow in their knowledge of the faith and personal holiness
- To witness to the Gospel in his place of employment
- To understand the implication of political decisions in view of the Gospel and the social justice teaching of the Church; to sensitize God's people with an informed social consciousness; to evangelize non-Christians and Christians
- To prepare a proper exegesis and contemporary application of the biblical text (s); apply biblical text (s) with the Tradition and teaching of the Church to issues confronting the community today
- To preach on matters of faith and morals, Christ's initiation and our response, expressing himself clearly and easily in a manner appropriate to the occasion; to be sensitive to the varied cultural, ethnic, racial and gender dynamics of the text and the message
- To utilize the skills for an effective homiletic or catechetical presentation through frequent social gospel preaching
- To inform the community of their obligation to respond to the needs of the poor and to serve as Jesus did
- To give personal witness in speaking and living the Gospel in his place of employment and in the marketplace with boldness, linking the sanctuary to the neighborhood, as well as the needs of the neighborhood to the sanctuary; to organize business leaders and neighbors around the Gospel, even on an ecumenical basis
- To lead and/or provide for baptisms, communion services, burial services, weddings, non-sacramental reconciliation rites, devotions, and Sunday celebrations in the absence of a priest as a liturgical presider
- To exercise the ministry of deacon in Eucharistic celebrations; to identify the table of Eucharist with the table of the poor, bringing their needs to the Universal Prayer;
- To exercise his role in conformity with the Church's liturgical directives
- To collaborate with the pastor, other priests and deacons, worship committees, and liturgical ministers in planning and implementing the liturgy; to provide effective baptismal and marriage preparations in accordance with canonical norms and directives of the diocesan Church; to guide liturgical planning; to coordinate liturgical ministers or enable others to exercise that role
- To serve in charitable care the needs of the poor, homeless, elderly, imprisoned, ill (including people with AIDS), and the marginalized of any kind
- To create an environment of hospitality toward all people, especially the stranger and the marginalized; to join in coalition with other religious and secular groups for common political and community-based action; to integrate justice themes into his life and ministry

Components of Pastoral Formation

Pastor

The pastor is responsible for all parish ministry within the parish. He will guide the candidate in the implementation of pastoral care for the parish. Unlike the formation of seminarians, the primary exposure to liturgy and service at the altar occurs in the parish setting for the candidate. The pastor should invite the candidate to serve at the altar whenever the candidate fulfills his regular Sunday and Holy Day Obligations. Additionally, the pastor can guide the candidate in works of charity within the parish setting and how to grow in pastoral sensitivity toward others.

Parish Service

As part of his formation, the aspirant or candidate is expected to be of service to his parish during the years of formation. Service to the parish helps expose the aspirant or candidate to the various ministries of the deacon, so that he can develop and grow in his pastoral skills.

The aspirant or candidate should particularly seek to learn the function and ordering of his parish sacristy and to serve at the various liturgies of the parish. Examples would be to serve at the altar whenever attending Mass, to offer to function as an Master of Ceremonies at major parish liturgies, to learn from the sacristan where things are set up in the parish and to offer assistance when attending Mass or other liturgical functions. These experiences will reinforce formational topics and prepare the candidate for his readiness to serve at the altar.

Pastor's Report

As part of the evaluative process, your pastor, who witnesses your interaction with your family, the parish staff, members of clergy, and parishioners is tasked with writing an evaluation of your affective maturity and threefold ministry of word, liturgy, and charity.

Deacon Mentor

The mentor is a key participant in the pastoral formation of future deacons. The deacon mentor assists the candidate to reflect theologically on his pastoral ministry; that is, to integrate his humanity, spiritual life, and academic knowledge to discern the movement of the Spirit in pastoral work. The deacon mentor is also a resource to the candidate in developing good liturgical

and pastoral habits.

Summer Service Project

As part of the candidate's training in social ministry, during three of the five summers in the program, the candidate is expected to participate in 10 to 12 hours of charitable ministry in the summer. This ministry is coordinated with Archdiocesan Catholic Social Services.

Theological Reflection

Theological Reflection is a conscious reflection on life experience in ministry, accomplished in the light of one's faith and theological tradition, and respectful of the thoughts and emotions evoked by the event both in the minister and in those to whom he ministers. The purpose of the reflection is to assist the Diaconate Candidate in consciously integrating pastoral activity with the other pillars of formation.

Deacon Mentor Report

As part of the evaluative process, your mentor, who reflects theologically with you and witnesses your liturgical and pastoral ministry is tasked with writing an evaluation of your ministerial suitability for the threefold ministry of word, liturgy, and charity.

Acolyte Service at the Cathedral

After a candidate has been instituted as an Acolyte, he will be part of an altar team that will assist the Archbishop with Sunday evening Masses under the direction of the archdiocesan liturgist. The candidate can expect to be called to serve at the Cathedral four to six times during his acolyte year.

Classes and Workshops

- Understanding and working with others: *DiSC*[®] part II (Workshop, Year I)
- Communicating with difficult people: *DiSC*[®] part III (Workshop, Year II)
- Deacon Panel (Workshop, Year V)
- Healthy Boundaries n Ministry (Workshop, Year 2)
- Lector Practicum

- Acolyte Practicum
- Liturgical Practicum
- Homiletic Practica (Years 2-5)

FORMATION GROUP

Pastor

The pastor assists in the formation of the aspirant/ candidate by providing opportunities for ministry in the parish setting. He also provides insight into the aspirant/candidate's relational skills and affective maturity because he is able to see the aspirant/candidate function in various social and ministerial settings.

At every level of formation it is imperative that input is received from the Pastor of the Inquirer, Aspirant, or Candidate. Failure to receive the requested evaluation forms from Pastors, or their delegate, will result in the individual not proceeding to the next level of formation.

Spiritual Director

Aspirants and Candidates are expected to acquire a Spiritual Director who will assist them in the development of their spirituality. The Spiritual Director may not be a pastor or other priest who serves in any supervisory capacity over the candidate and should be drawn from the approved list of spiritual directors. The name and the phone number of the Spiritual Director will be kept on file in the Diaconate Office.

If an aspirant or candidate desires a spiritual director who is not on the approved list he may submit a request for approval form for the new spiritual director and submit the request to the office. However, the aspirant or candidate cannot take anyone for their spiritual director unless the new spiritual director has been approved through the School of Diaconate Formation by the Archbishop.

Deacon Mentors

“The community of Deacons can be a precious support in the discernment of a vocation, in human growth, in the initiation to the spiritual life, in theological study and pastoral experience. Scheduled opportunities for conversation and shared ministerial experiences between a Candidate and

Deacon, as well as between the wife of a Candidate and the wife of a Deacon can mutually sustain their enthusiasm and realism about the Deaconate. Some members from the community of Deacons can be appointed by the bishop to serve as Mentors to individual Candidates or a small group of Candidates” (ND, 210).

Mentoring is a process by which the Deacon Mentor and spouse, observe, reflect, suggest, encourage and challenge the Candidate and wife in their discernment. The Mentor actively listens to the events in the Candidate’s life, challenges their theological assumptions, encourages their prayer life and family life, and encourages their growth as a minister of justice and love in their family, workplace, and parish community. The Mentor also provides an opportunity to discuss freely and frankly difficulties in ministry and the ebb and flow of formation.

The candidate is the person primarily responsible for his formation. The deacon mentor provides the candidate with valuable guidance, advice and help. The relationship should enable the candidate to reflect on and learn from the mentor’s experiences. It is the responsibility of the candidate to take initiative, demonstrate his capabilities, ask questions and engage in experiential opportunities. The efficacy of the assistance provided by the deacon mentor is dependent upon several factors including the nature of the relationship between the two men, the effort expended by the deacon mentor, and how well the candidate fulfills his role and responsibilities.

A candidate has certain responsibilities that must be fulfilled. Those responsibilities include:

- Regularly praying for and with the deacon mentor and his family
- Developing respect for the deacon mentor’s experience and views
- Being open to learning through discussion and experiences
- Asking questions when uncertain or in need of clarification
- Actively listening to the deacon mentor
- Being respectful of the deacon mentor’s time and using him as an effective resource
- Being willing to engage and challenge the deacon mentor
- Scheduling all regular meetings with the deacon mentor—the candidate should ask for the meetings, one tactic is to schedule the next meeting at the conclusion of each meeting;
- Avoiding last minute cancellations or postponements of the meetings
- Remaining available to meet with the deacon mentor and participate in his ministries when

opportunities arise on short notice

- Arriving at all meetings prepared and actively and fully engaging during the meeting;
- Bringing his Portfolio to each meeting with his deacon mentor
- Sincerely attempting to put into practice, the suggestions and recommendations made by the deacon mentor

Formation Team

The Formation Team is composed of the Dean of the School of Diaconal Formation and deacons appointed by the Archbishop. The role of the Formation Team is to oversee the formation program and the formational development of those in the program. The Formation Team is tasked to evaluate candidates at each step of the formation process and submit their recommendation to the Rector of St. Charles Borromeo Seminary on the suitability of the Deacon Candidate for advancement within the program and for orders. They also conduct annual formation interviews and offer input in the placement of the newly ordained.

Dean of Formation

The Dean of the School of Diaconal Formation oversees and is primarily responsible for the formation of Permanent Deacons on behalf of the Rector of St. Charles Borromeo Seminary. The Dean functions as the liaison between the Formation Team and the Rector of St. Charles Borromeo Seminary.

Liturgical Coordinator

The Liturgical Coordinator assists the Dean by overseeing the liturgical life of the program. He coordinates the liturgies, establishes liturgical ministry schedules and oversees the liturgical formation of the program.

Mentor Coordinator

The Mentor Coordinator assists the Dean by assigning Mentors to the candidates, assists in the training of Mentors, and helps track the collection of data and reports.

Spiritual Coordinator

The Spiritual Coordinator assists the Dean by keeping lines of communication open between the Formation Team and Spiritual Directors. He also assists in the setup of retreats and days of recollections.

Pastoral Coordinator

The Pastoral Coordinator assists the Dean by working with the Office of Catholic Social Services in the assignment candidates to their summer service placements.

Academic Coordinator

The Academic Coordinator assists the Dean by coordinating the homiletics program, overseeing the Final Competency Exam, and identifying those who face academic challenges so that they may be offered additional assistance.

Rector of St. Charles Borromeo Seminary

The Rector of St Charles Borromeo Seminary is responsible for all the programs under the umbrella of the seminary. Informed by the recommendations of the Formation Team and the Dean of the School of Diaconal Formation, the Rector endorses the candidate to the Archbishop at every level of formation and offers his input into the assignments of the newly ordained.

Associate to the Vicar for Clergy

The Associate to the Vicar for Clergy, on behalf of the Vicar for Clergy, oversees the ordained Permanent Diaconate Community. The Archbishop of Philadelphia makes diaconal assignments and accepts candidates into the formation program in collaboration with the Associate to the Vicar for Clergy.

WITHDRAWAL FROM FORMATION

Occasionally, an aspirant or candidate for the Permanent Diaconate withdraws from formation. The following policies apply to these situations:

Inquirer

When an inquirer halts the application process for any reason at any time, a note is made in their file to that effect. A note is sent to their pastor informing him that the person he has sponsored is no longer being considered for formation.

If the decision to withdraw was made by the Inquirer, no further action is taken. If the decision to withdraw was made by the Admissions Committee, the Associate to the Vicar for Clergy will determine the method of communication and whether or not other actions are deemed necessary. Other actions may include, but are not limited to, personal visit, follow-up phone or email communications, etc.

Aspirant and Candidate

Voluntary withdrawal: The aspirant/candidate should submit a written notice of withdrawal containing the reasons for withdrawing. Upon receipt of written notice that an aspirant or candidate has withdrawn from formation, the Dean of the School of Diaconal Formation will notify the Rector of St. Charles Seminary and the pastor. A meeting with the aspirant/candidate will be arranged and a report will be filed. Follow-up activities may ensue at the discretion of the Formation Team, including phone or email communications, personal visits, etc.

Involuntary Withdrawal: Upon recommendation of involuntary withdrawal by the formation team and approval by the rector of St. Charles Borromeo Seminary and the Archbishop, the Dean of the School of Diaconal Formation will notify the candidate/aspirant's pastor. A meeting will be arranged between the aspirant/candidate (and his wife) and others who may be invited at the request of the Formation Team or the aspirant/candidate at which time they will be notified of the action and the reasons the action was taken.

Follow-up activities may ensue at the discretion of the Formation Dean, including phone or email communications, personal visits, etc.

Leave of Absence/ Break in Formation and Reinstatement

Inquirer: If an inquirer either requests or is asked to take a postponement in their formation, a note is made on their file and the pastor is notified. The Associate to the Vicar for Clergy will determine what, if any, follow-up is needed on a case-by-case basis.

If at some time, the inquirer wishes to return to formation, they will need a letter of support

from their pastor, an updated application and any other materials that are deemed necessary by the Admission Committee. Upon completion of these steps, the Inquirer will be permitted to rejoin formation, though normally with a different cohort.

Aspirant: If an aspirant decides to delay his request for Candidacy or if the Formation Team recommends that a delay occur, the Dean of the School of Diaconal Formation, upon written or verbal notice of such, will meet with the aspirant to aid in the discernment of status. The Archbishop, the Rector of St. Charles Borromeo Seminary, and the aspirant's pastor are notified. A note is attached to his file specifying the conditions of his delay.

Contact with the aspirant will be maintained during this time and until the aspirant either applies for readmission or asks for termination of formation.

To be reinstated, the aspirant must request such in writing, the aspirant's pastor must send a letter of support and any other conditions stipulated at the time of his withdrawal must be met. If married, his spouse must submit a letter stating her awareness that he seeks reinstatement and offering her support. The Formation Committee will review the petition, interview the aspirant (and his wife) and advise the Dean of Formation regarding the merits of the petition.

If the petition is accepted, the aspirant will join a new cohort of aspirants and resume all other aspects of formation. If the petition is not accepted, the Dean of the School of Diaconal Formation can meet, upon request, with the aspirant and their pastor (and wife) to discuss termination of formation.

Candidate: If a deacon candidate decides to take a leave of absence during their candidacy or if the Archbishop requests such an action, the Dean of the School of Diaconal Formation will meet with the candidate and their pastor (and wife) in order to discern and communicate the conditions of this leave, especially the length of the term of absence, the nature of supervision and any goals that are to be achieved during this period. A letter specifying those conditions will be generated, sent to the appropriate parties and a copy will be placed in the candidate's file. Contact with the candidate will be maintained during this time and until the candidate either applies for readmission or asks for termination from formation.

To be reinstated, the candidate must make a request in writing and receive written support from their pastor. If married, his spouse must submit a letter stating her awareness that he seeks reinstatement and offering her support. The candidate (and his wife) will meet with the Dean of

Formation to begin the process of reinstatement. The candidate (and his wife) will also meet with a member of the Formation Team who will advise the Dean on the merits of the petition. The burden of proof of readiness for ordination rests with the candidate.

If it is determined that the candidate is to be readmitted, the Dean of the School of Diaconal Formation, with advice from the Formation Team, will determine the best way for this to occur. It is likely that the candidate will join a different cohort.

In the event that it is determined that the candidate is not ready for reinstatement, the Dean of the School of Diaconal Formation will meet with him to determine an appropriate course of action.

Transfers

Coming into the Diocese

When a person applies for admission to formation, they sometimes do so after being accepted into various stages of formation in another diocese. The Formation Team will determine what, if any, affect this formation will have on the status of the application. In any event, if it is determined that an applicant was formally accepted into diaconal formation in another diocese, a letter of recommendation will be required from the Dean of the School of Diaconal Formation in the previous diocese in addition to all the regular documentation required for admissions.

Leaving the Diocese

Inquirers: no action is taken and no recommendations are given.

Aspirants and Candidates: See the policy on voluntary withdrawal. A letter of recommendation may be sent if the Aspirant or Candidate wishes to continue formation in their new Diocese.

APPENDIX I: GRIEVANCE POLICY

Purpose

The purpose of this academic and non-academic grievance procedure is to provide for the resolution of candidate grievances, including allegations of sexual harassment, discrimination, academic challenges of grades, and the denial of reasonable accommodations to persons with disabilities. This policy is not applicable to issues of seminary formation and discipline.

Grievance Procedure

Informal Resolution

Before initiating a formal grievance, a candidate should discuss the matter in dispute with the person against whom the candidate has a grievance and seek a mutual resolution of concerns. The candidate may be encouraged to return to this informal level of resolution at any time during this procedure.

Initiation of Complaint

If an informal resolution does not result, the candidate must submit a complaint form to the Appropriate Administrator to initiate a formal grievance. While initially a candidate's concerns may be communicated orally; a written grievance must be submitted before any review or other action takes place. This complaint should be submitted soon after the candidate is aware of the subject problem. The complaint must specify the policy, procedure or norm violated, and specifically set forth all relevant factual details. The Appropriate Administrator will first determine whether the complaint's allegations warrant implementing the remainder of the grievance procedures. If sufficient criteria are not met, the Appropriate Administrator will inform the candidate in writing and copy the Rector. With sufficient criteria, the Appropriate Administrator will forward a copy of the complaint to the respondent who the allegation is being directed.

Witness Response

The Respondent shall be given five working calendar days from receipt of the complaint to return a written response to the Appropriate Administrator. Necessary extensions may be granted by the Appropriate Administrator.

Review by Designated Party

The Appropriate Administrator with the consent of the Rector may initiate a reasonable investigation into the matter. The investigation may include, but is not limited to, meeting with the parties, talking with witnesses, and reviewing any supporting documents.

Recommendation to Rector

Within a reasonable time, the Appropriate Administrator shall make a recommendation to the Rector based on the written complaint, response and any other information deemed relevant.

Decision

A final decision will be rendered from the Appropriate Administrator with the approval of the Rector. Grievant and Respondent shall be notified in writing of the decision. A copy of the written decision shall be retained in the office of the Appropriate Administrator for one year after the final decision was issued.

APPENDIX II: SAFE ENVIRONMENT GUIDELINES²⁵

The following guidelines are reflective of the 2015 changes to Pennsylvania Child Protective Services Law and Archdiocesan Policy for the Protection of Children and Young People effective July 1, 2015.

Archdiocesan policy requires all Church personnel including priest, religious, deacon, pastoral minister, employee, school employee, parish employee, contract employee must obtain clearances, as required by Pennsylvania law. This includes any individual 14 years of age or older applying for or in a paid position as an employee responsible for the welfare of a child or having direct contact with children—additionally, all adult volunteers (unpaid) who may have any possible contact with or responsibility for children. Archdiocesan compliance guidelines state that clearances should be submitted prior to the commencement of employment or volunteer service.

Required Clearances

The following clearances must be obtained by employees:

- Federal Bureau of Investigation Fingerprint Clearance
- Pennsylvania State Police Clearance
- Pennsylvania Child Abuse History Clearance

Please note: The state has strengthened the Child Protective Services Law (CPSL). Some individuals who were not previously required to obtain the FBI Fingerprint Clearance must obtain it now. Exceptions can no longer be made, related to the start date. Anyone who is a paid staff member must have all clearances.

The following clearances must be obtained by volunteers living in PA for less than 10 years:

- Federal Bureau of Investigation Fingerprint Clearance
- Pennsylvania State Police Clearance
- Pennsylvania Child Abuse History Clearance

The following clearances must be obtained by volunteers living in PA continuously for 10 years:

- Pennsylvania State Police Clearance

²⁵ For a complete explanation please refer to the Office for Youth and Child Protection <http://childyouthprotection.org/index.php>

- Pennsylvania Child Abuse History Clearance

Disclosure Statement application for volunteers to be filed at the place of service.

Obtaining Required Background Checks

1. PA State Police Criminal Record Check Can be obtained online at <https://epatch.state.pa.us/Home.jsp> with results available within a few minutes
2. PA Department Human Services Child Abuse History Clearance Can be obtained online at <https://www.compass.state.pa.us/CWIS>
3. Federal Criminal Background Check: Go to <https://www.identogo.com/> to schedule an appointment

Clearance Renewal Requirements

All required clearances, including FBI, must be renewed every five years (36 months).

Volunteers who have been a resident of Pennsylvania for less than 10 years must renew their FBI Fingerprint clearance until they reach 10 years of residency in Pennsylvania. Once the volunteer meets the 10 year residency requirement, they must complete a Disclosure Statement Application for Volunteers which must be submitted every five years.

PA Legal Issues that are Impediments to Acceptance²⁶

- An offense under one or more of the following provisions of Title 18 of the Pennsylvania Consolidated Statutes (enumerated offences):
 - Chapter 25 (relating to criminal homicide).
 - Section 2702 (relating to aggravated assault).
 - Section 2709.1 (relating to stalking).
 - Section 2901 (relating to kidnapping).
 - Section 2902 (relating to unlawful restraint).
 - Section 2910 (relating to luring a child into a motor vehicle or structure).
 - Section 3121 (relating to rape).
 - Section 3122.1 (relating to statutory sexual assault).

²⁶ Refer to

<http://childyouthprotection.org/docs/AOP%20Policy%20background%20check%20FAQ%20FINAL%206.2.15.pdf>

- Section 3123 (relating to involuntary deviate sexual intercourse).
 - Section 3124.1 (relating to sexual assault).
 - Section 3124.2 (relating to institutional sexual assault).
 - Section 3125 (relating to aggravated indecent assault).
 - Section 3126 (relating to indecent assault).
 - Section 3127 (relating to indecent exposure).
 - Section 3129 (relating to sexual intercourse with animal).
 - Section 4302 (relating to incest).
 - Section 4303 (relating to concealing death of child).
 - Section 4304 (relating to endangering welfare of children) .
 - Section 4305 (relating to dealing in infant children).
 - A felony offense under section 5902(b) (relating to prostitution and related offenses).
 - Section 5903(c) or (d) (relating to obscene and other sexual materials and performances).
 - Section 6301(a)(1) (relating to corruption of minors).
 - Section 6312 (relating to sexual abuse of children).
 - Section 6318 (relating to unlawful contact with minor).
 - Section 6319 (relating to solicitation of minors to traffic drugs).
 - Section 6320 (relating to sexual exploitation of children).
 - An offense designated as a felony under the act of April 14, 1972 (P.L. 233, No. 64) known as “The Controlled Substance, Drug Device and Cosmetic Act.”
 - An offense similar in nature to those crimes listed in clauses (1) and (2) under the laws or former laws of the United States or one of its territories or possessions, another state, the District of Columbia, the Commonwealth of Puerto Rico or a foreign nation, or under a former law of this Commonwealth.
 - If the report of criminal history record information indicates the person has been convicted of a felony offense of the first, second or third degree other than those enumerated under subsection (e), the person shall be eligible for prospective employment only if a period of ten years has elapsed from the date of expiration of the sentence for the offense.
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- If the report of criminal history record information indicates the person has been convicted of a misdemeanor of the first degree, the person shall be eligible for prospective employment only if a period of five years from the date of expiration of the sentence for the offense.
 - If the report of criminal history record information indicates the person has been convicted more than once for an offense under 75 Pa.C.S. § 3802(a), (b), (c) or (d) (relating to driving under the influence of alcohol or controlled substance) and the offense is graded as a misdemeanor of the first degree under 75 Pa.C.S. § 3803 (relating to grading), the person shall be eligible for prospective employment if only a period of three years has elapsed from the date of expiration of the sentence for the most recent offense.
-

APPENDIX III: GUIDELINES REGARDING SPIRITUAL DIRECTION

Spiritual Direction is the help given by one Christian to another that enables that person to pay attention to God's personal communication to him/her, to respond to this personal communicating God, to grow in intimacy with this God, and to live out the consequences of the relationship.

A Spiritual Director is a person who knows the Spiritual life, can share his faith and help people discern God's will in their lives. He does more listening and praying than advising. A Spiritual Director is a "sounding board", a confidant with whom our deepest desires and disappointments can be shared in faith, with a view to growth and healing.

Spiritual Direction takes place when two people agree to give their full attention to what God is doing in one (or both) of their lives and seek to respond in faith. Whether planned or unplanned, three convictions underpin these meetings: (1) God is always doing something: an active grace is shaping this life into a mature salvation; (2) responding to God is not sheer guesswork: the Christian community has acquired wisdom through the centuries that provides guidance; (3) each soul is unique: no wisdom can simply be applied without discerning the particulars of this life, this situation.

The faithfulness of God is at the core of spiritual direction. When we seek spiritual direction, we are utterly dependent on God and God's love reaching for us. Willingness to place our hope in God is also a necessary element. We long to experience God's presence in this shattered, exquisite world and need help to believe in our own ability to recognize God's voice. We need encouragement to trust God to be God, to trust the Holy Spirit in another person, and to trust God for a particular spiritual direction relationship. It is helpful to remember that all initiative is not ours. In fact, any movement on our part (regardless whether it be voluntary or necessity for the discernment of a vocation) toward God through spiritual direction is an indicator that God has been seeking us.

The prayerful context of spiritual direction becomes the environment for speaking, listening, doubting, questioning, challenging, teaching, counseling, clarifying, discerning, affirming, restoring, comforting, healing, and encouraging. It provides an open space for us to talk, pray, and pay attention with someone who listens to us speak about our hopes, dreams, and fears and respects the way we perceive the realities of God with us.

Spiritual Direction conversations contain cognitive and affective information and

responses. We talk about what we think and what we feel. We describe concepts, understandings, and emotions and notice our responses even as we speak. There are moments of silence and times when we are aware of newness and of the Spirit's presence. We are often touched with gladness. Spiritual direction helps us hear, recognize, and pay attention to the voice of our faithful love - God.

Qualities of a Good Spiritual Director

- Trained
 - Confidential
 - Person of faith
 - In spiritual direction
 - Rooted in the Bible
 - Solid grounding in Theology
 - Believe in, seek, and have a deepening, ongoing love/faith relationship with the Trinity
 - Believe that God is the source of all knowledge
 - Trust in the Holy Spirit
 - Person of prayer
 - Honest
 - Shows signs of being engaged in life and with people (real)
 - Optimistic, but not naïve
 - Good-humored
 - Contemplative attitude through prayer
 - Warm
 - Committed and available
 - Patient listener
 - Self-confident
 - Unafraid of strong emotions
-

Requirements

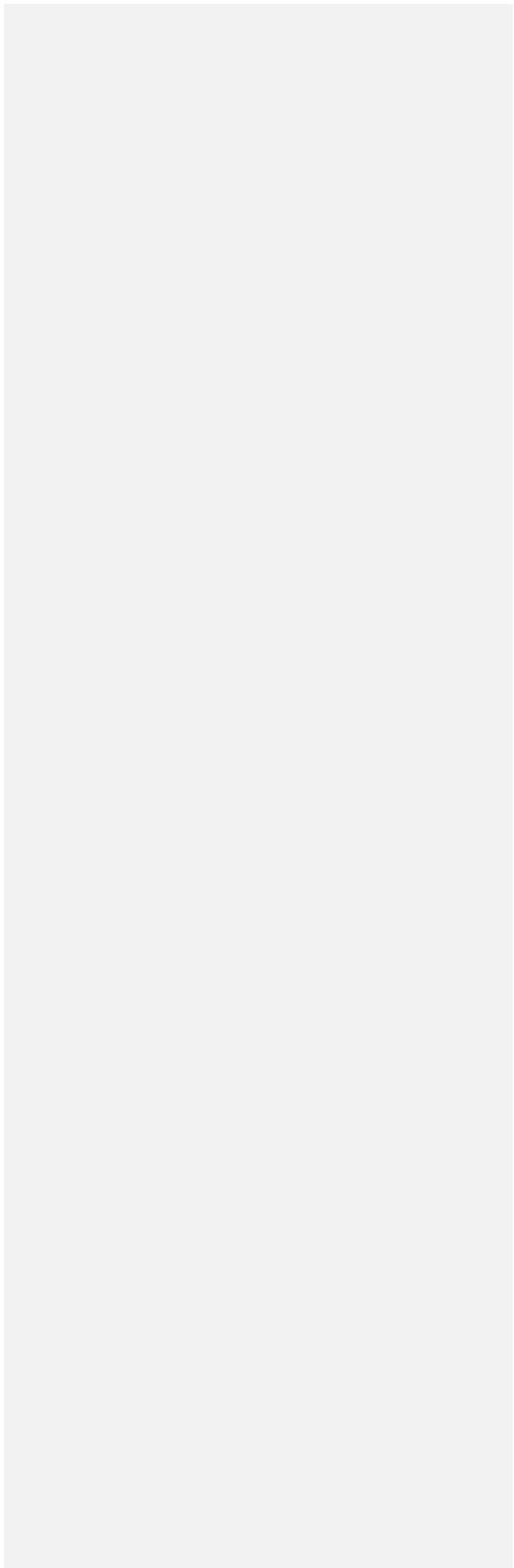
During formation, an aspirant/ candidate should meet with the Spiritual Director at least every two months. After ordination, the frequency of meetings will depend on the deacon and his needs, suggestions of the Spiritual Director, and the Holy Spirit.

What Spiritual Direction must not be

- “Locked into” the first choice
- Untrained people
- One day/one time
- Therapy or interpersonal problem resolution/solving
- Psychological paradigms and analyses
- Oriental program & techniques
- Extreme ideologies
- “Nice”, “holy”, or “just someone to talk to”
- Not a time for rumor or complaint discussions
- A situation where the Directee becomes the Director

APPENDIX V: MENTOR MEETING LOG

| Date of Meeting | Location | Deacon Mentor |
|------------------------|-----------------|----------------------|
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APPENDIX VI: MENTOR MEETING NOTES

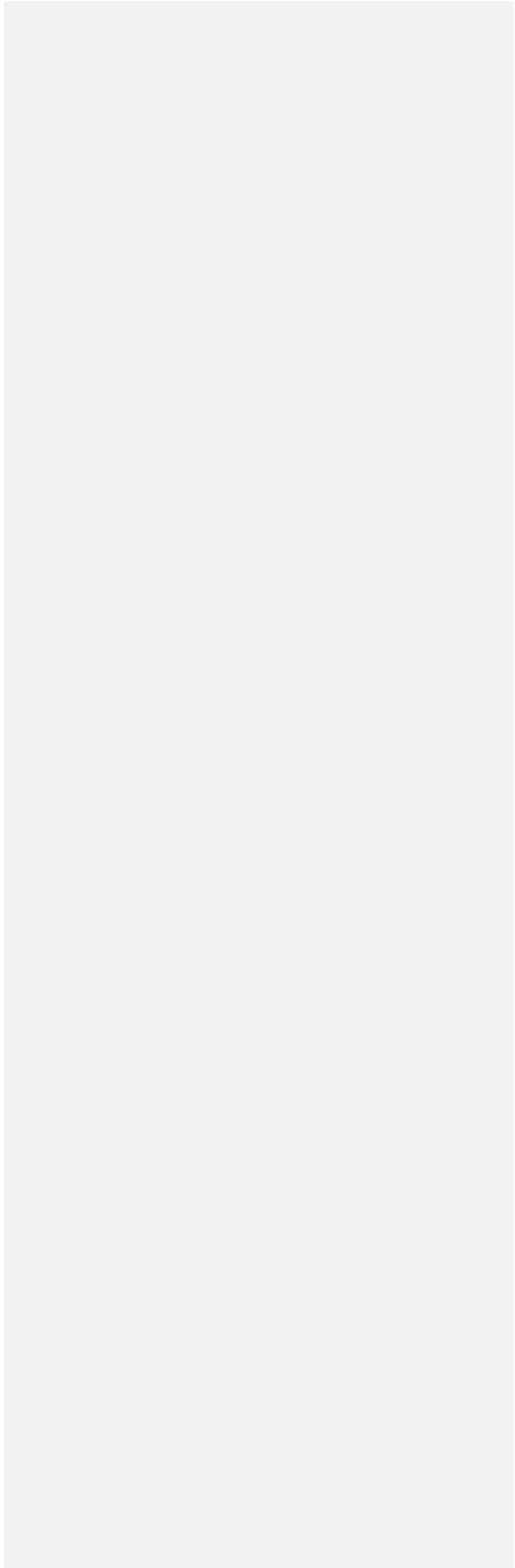
Date of Meeting: _____

Location: _____

Mentor: _____

Main Focus of Session:

Comments and Notes:



APPENDIX VI: MINISTRY PARTICIPATION LOG

Date: _____

Ministerial Activity: _____

Location: _____

Mentor: _____

What was observed:

What did I learn or how will this inform my ministry:

Comments and Notes:

APPENDIX VII: THEOLOGICAL REFLECTION GUIDE

It would be useful for small groups of candidates to engage each other in theological reflection “on the challenges and opportunities of their ministries” in relationship to the Gospel and magisterial teaching [...] The candidate reports on his field education experience and the community enables him to reflect upon the human, spiritual, intellectual, and pastoral dimensions of his actions” (ND, 216, 221).

“Supervision, theological reflection, and evaluation are necessary components of an effective pastoral program. Although theological reflection can help the development of pastoral skills, its primary purpose is to interpret pastoral experience or activity in light of Scripture, church teaching, personal faith, and pastoral practices. Reflection of this kind should become a lifelong habit in priestly ministry.” (PPF, 248)

Theological Reflection: Purpose and Goals

What is Theological Reflection?

Descriptive definitions:

- **Theological Reflection** is a conscious reflection on life experience in ministry, accomplished in the light of one’s faith and theological tradition, and respectful of the thoughts and emotions evoked by the event both in the minister and in those to whom he ministers. The purpose of the reflection is to assist the Diaconate Candidate in consciously integrating pastoral activity with the other pillars of formation.
- **Theological Reflection** is the ability to bring the Christian tradition into fruitful dialogue with contemporary experience; the goal being to interpret the experience so as to understand God’s will and action in the world, and to formulate an appropriate pastoral response to a situation. In this context then, Theological Reflection is the critical and constant foundation at the heart of a Deacon’s ministry and prayer.

Why do Theological Reflection?

- It is imperative that a candidate for the Diaconate learn to look at human experience through the prism of faith and theology.

- It is a written task because the discipline involved requires sustained reflection and because the reflection then can be shared with those guiding the candidate's formation process.

Why a three-fold process?

Each part of the *Theological Reflection Paper* strengthens a particular skill.

- **Part I** invites the Candidate to be a keen observer of the events that are going on around him (situational awareness).
 - **Part II** requires that the candidate acknowledge the impact that his thoughts and emotions have on a pastoral situation, both in the minister and in the one who is served (emotional intelligence).
 - **Part III** invites the Candidate to connect his theological training to his experience of ministry, so as to enhance his effectiveness in ministry and to fuel his desire for further theological study (integrated theology/spirituality).
-

APPENDIX VIII: PORTFOLIOS

- A collection of tangible materials or products that provide evidence of skills developed.
- Success of portfolio usage is contingent upon establishing purpose by instructors or between instructors and learners.
- Has power to motivate as result of more ownership in learning goals and subsequent self-appraisal of those goals.

Why Portfolios

- Consistent with adult learning
 - Learners share responsibility for outcomes
 - Complex outcomes more effectively measured
 - Reveals current progress and future growth needs
 - Provides evidence of appropriateness of instruction
-

APPENDIX IX: CHARACTER OF THE MENTOR RELATIONSHIP²⁷

- **Adult Relationship.** Adults, particularly men, prefer to learn in situations that are practical and problem-centered. They learn by integrating new ideas with their existing knowledge. As adults, the candidates recognize they are on a journey and that their mentor is a fellow journeyman—a man who has a bit more experience.
- **Ministry of Service.** Mentoring is characteristic of a deacon’s vocation because it is service provided to another person. It is focused on the needs of the candidate. As in other forms of ministry, the mentor will be challenged, will grow, and will identify areas for his own personal development.
- **Outcome Directed.** Mentoring is always directed toward an outcome and the outcome (if the candidate is indeed called by God) is reception of the Sacrament of Holy Orders as a deacon. The mentoring, therefore, must be aligned with who a deacon is rather than what a deacon does. The process must also leave room for movements of the Holy Spirit in the life of the candidate.
- **Involves all Four Pillars of Formation.** Mentoring has to address the formation of the candidate intellectually, spiritually, pastorally, and as a human person. It must assist him in seeing the reality and interaction that exists between these areas and help him develop and grow in each one. The candidate must understand that a deacon’s actions in Word, Liturgy, and Charity are interconnected and that the active participation in all three areas is vital for a healthy vocation and ministry.
- **Standards Based.** The standards used for evaluation are those found in the National Standards. These standards should be read by all deacon mentors at least annually. They not only help us understand who the candidate may be called to become, but who the mentor is to be as well.
- **Benefits Both Parties.** A good mentoring relationship has to benefit both the mentor and the candidate. Both should recognize they are journeying toward God and can provide mutual support.

²⁷ Adapted from Deacon Steve Swope, *Deacon Mentors—An Essential Element in Diaconate Formation*, Deacon Digest

APPENDIX X: POLICY AGAINST SEXUAL VIOLENCE, SEXUAL HARASSMENT AND STALKING

Introduction

Saint Charles Borromeo Seminary (“SCS”) is committed to promoting a safe and healthy environment for all members of its community. All students, faculty, staff and visitors have the intrinsic right to remain free from any form of sexual violence, sexual harassment and stalking at all times, but especially while on SCS property. SCS considers any form of sexual violence, sexual harassment and stalking, and any attempt to commit such acts, to be serious misconduct that may result in disciplinary action up to and including expulsion or termination of employment. In addition, acts of sexual violence, sexual harassment and stalking could violate federal, state and local laws, and perpetrators of such acts may be subject to criminal prosecution.

SCS has adopted this policy against sexual violence, sexual harassment and stalking (“Policy”) in order to educate its students, faculty, staff and visitors about the various forms of sexual violence, sexual harassment and stalking, and to prevent any such acts from taking place on campus or involving members of the SCS community. This Policy outlines the steps SCS takes to prevent and respond to any incidents of sexual violence, sexual harassment and stalking that occur within the campus community.

Prohibited Conduct and Definitions

SCS prohibits any form of sexual violence, sexual harassment and stalking from taking place on its campus.

A. **Sexual Violence** can take many forms and includes a range of behaviors in which an act of a sexual nature is taken against another person without the individual's consent or when the individual is unable to consent. Examples of sexual violence include, but are not limited to: sexual assault, rape and sexual exploitation.

- **Sexual Assault** is defined as having committed, or attempting to commit, any physical sexual contact through the use or threat of force, violence or any other form of coercion or intimidation. Sexual assault may also include physical sexual contact with an individual who cannot provide consent to engage in the contact due to incapacity or mental or physical impairment. An individual may be considered “incapacitated” or “impaired” if s/he is under the influence of alcohol or drugs or is too young to consent to the sexual contact.
- **Rape** is a form of sexual assault that involves the forced penetration of another person's oral, anal or genital opening with a body part or any object.
- **Sexual Exploitation** is an act or omission to act involving one person taking sexual advantage of another person in a non-consensual, unjust, humiliating or abusive manner, for the benefit of himself or for another individual, but not for the benefit of the victim.

Consent to any sexual contact must be explicitly communicated, through words or actions, by all parties involved. Consent must be informed, voluntarily and freely given by all parties. Consent may not be inferred from an individual's silence, passivity or lack of resistance, but instead must consist of an outward demonstration that an individual has freely chosen to engage in the sexual contact. Consent to any sexual contact may not be obtained through any form of coercion, intimidation and/or harassment.

An individual's consent to one form of sexual activity does not mean that s/he consents to other forms of sexual activity, nor does a current or previous dating, marital, or sexual relationship mean that an individual consents to any additional sexual activity. Assent shall not constitute consent if it is given by a person who because of youth, physical or mental disability, intoxication or other condition is unable to lawfully provide consent.

B. Sexual Harassment consists of any form of unwelcome sexual conduct, including sexual advances, requests for sexual favors or any other behavior that is of a sexual nature. An individual engages in sexual harassment when s/he makes submission to such sexual conduct a term or condition of another person's employment and/or education. Sexual harassment encompasses sexual conduct that unreasonably interferes with a person's professional and/or academic performance, or creates a hostile work and/or learning environment for the individual.

C. Stalking is when an individual engages in a repeated course of conduct that is directed at specific person(s) that would cause a reasonable person to fear for his or her safety or the safety of others, and/or suffer significant emotional distress. Stalking may be conducted face-to-face or through the use of electronic means such as email, the internet, social media, cellular telephones, blogs, or other similar applications and/or devices.

Reporting Procedures

If you feel that you have been the victim of sexual violence, sexual harassment and/or stalking, then you are strongly encouraged to report the incident to the SCS Department of Safety and Security at 610-785-6238 immediately. Victims of sexual violence, sexual harassment and/or stalking are also strongly encouraged to preserve any evidence related to the incident. SCS encourages and recommends that all victims of sexual violence, sexual harassment and/or stalking to report the incident(s) to local law enforcement or to the District Attorney in the county in which the unlawful act took place.

All SCS employees who bear a responsibility for student welfare and/or who are in a position of authority are required to report any incident of sexual violence, sexual harassment and/or stalking that involves a SCS student, employee, faculty member or visitor to the Director of Security who will refer it to the Director of Investigations for the Archdiocese, whether or not the alleged act took place on or off campus. This reporting requirement does not apply if the individual who learns of the alleged incident is required to maintain the confidentiality of the communication by law. Additionally, employees who have been advised that they are considered "campus security authorities" under the Jeanne Clery Disclosure of Campus

Security Policy and Campus Crime Statistics Act (“Clery Act”) are also required to report any such incidents to the Department of Safety and Security.

All SCS personnel are expected to comply with all applicable laws with respect to the reporting of allegations of sexual abuse of minors to civil authorities and shall cooperate in any investigation that follows from the making of such a report. SCS expressly prohibits retaliation against any individual who makes a good faith report of suspected child abuse or neglect in accordance with this policy and applicable state law. In addition to mandatory reporting required by Pennsylvania law, all SCS personnel are expected to promptly report allegations of a cleric’s sexual abuse of a minor to the Archdiocese of Philadelphia’s Director of Investigations, unless the information is received by a priest within the Sacrament of Reconciliation. Other clerics and religious working at the SCS are expected to cooperate with the process. The Archdiocese shall take all appropriate steps to protect the good name and reputation of all persons involved in this process.

a) Child abuse consists of a variety of wrongful acts committed upon children that include but are not limited to sexual abuse, physical injury, mental injury, and neglect. The term “child abuse” as used in this Policy shall have the same definition as set forth in the Pennsylvania Child Protective Services Law. See 23 Pa.C.S. §§ 6303 and 6304.

b) A child is any individual under the age of 18. In all cases of suspected child abuse, mandated reporters, as defined below, are required to report the suspected abuse to ChildLine, the 24-hour statewide system operated by the Pennsylvania Department of Public Welfare to receive such reports (**1-800-932-0313**) (toll free). In addition to the telephonic report, a CY 47 form must be submitted to the Children and Youth services in the county where the suspected abuse occurred within 48-hours of making any report to ChildLine.

- ***In all cases of suspected child abuse, Pennsylvania law and Archdiocesan policy state that mandated reporters are required to:***

- Immediately call ChildLine toll free at **1-800-932-0313**.
- Within 48-hours of the telephonic report, submit a CY 47 (Appendix F) to the Children and Youth services in the county where the suspected abuse occurred. A CY-47 may be completed electronically at <https://www.compass.state.pa.us/CWIS>
- Notify the person in charge of the institution, unless that person is the suspected abuser. If the person in charge of the institution is the suspected abuser, then the mandated reporter must contact the Archdiocesan Office of Investigations toll free at 1-888-930-9010.

- ***In cases where the suspected abuser is a member of the clergy or is a Church official, employee or volunteer:***

- Immediately Call ChildLine toll free at **1-800-932-0313**.
- Within 48-hours of the telephonic report, submit a CY 47 (Appendix F) to the Children and Youth services in the county where the suspected abuse occurred. A CY-47 may be completed electronically at <https://www.compass.state.pa.us/CWIS>
- Notify the person in charge of the institution, unless they are the suspected abuser.
- The person in charge of the institution must notify the Archdiocesan Office of

Investigations toll free at 1-888-930-9010. If the person in charge of the institution is the suspected abuser the mandated reporter must contact the Office of Investigations.

You may also contact the Office of Investigations by writing to:

Office of the Director of Investigations
222 North 17th Street
Philadelphia, PA 19103

It is Archdiocesan policy to immediately refer any conduct that could constitute a crime (such as suspected child abuse) to law enforcement. Victims reporting abuse will be assigned a Victim Assistance Coordinator to work with them who will explain available mental health services.

c) **Mandated reporters.** --The following adults shall make a report of suspected child abuse, subject to subsection (b), if the person has reasonable cause to suspect that a child is a victim of child abuse:

1. A person licensed or certified to practice in any health-related field under the jurisdiction of the Department of State.
2. A medical examiner, coroner or funeral director.
3. An employee of a health care facility or provider licensed by the Department of Health, who is engaged in the admission, examination, care or treatment of individuals.
4. A school employee.
5. An employee of a child-care service who has direct contact with children in the course of employment.
6. A clergyman, priest, rabbi, minister, Christian Science practitioner, religious healer or spiritual leader of any regularly established church or other religious organization.
7. An individual paid or unpaid, who, on the basis of the individual's role as an integral part of a regularly scheduled program, activity or service, accepts responsibility for a child.
8. An employee of a social services agency who has direct contact with children in the course of employment.
9. A peace officer or law enforcement official.
10. An emergency medical services provider certified by the Department of Health.
11. An employee of a public library who has direct contact with children in the course of employment.
12. An individual supervised or managed by a person listed under paragraphs (1), (2), (3), (4), (5), (6), (7), (8), (9), (10) and (11), who has direct contact with children in the course of employment.
13. An independent contractor.
14. An attorney affiliated with an agency, institution, organization or other entity, including a school or regularly established religious organization that is responsible for the care, supervision, guidance or control of children.
15. A foster parent.

If any other member of the SCS community, such as students or visitors, learns of such an incident involving a minor, they are also encouraged to report the matter to ChildLine. This

reporting requirement does not apply where the SCS employee is a priest and he learned about the alleged abuse in the course of a confidential communication.

The Department of Safety and Security will take every measure possible to ensure that it responds to all complaints of sexual violence, sexual harassment and/or stalking promptly and thoroughly. Any individual who feels that his or her complaint did not receive a prompt and/or adequate response should contact the Office or the Rector at (610) 785-6200.

Rights of Complainants and Confidentiality

At the time a report is made to SCS, the complaint need not specify the course of action that s/he wishes SCS to take in response to his or her complaint. SCS supports a complainant's right to report an alleged incident of sexual violence, sexual harassment and/or stalking to either the Department of Safety and Security or local law enforcement. SCS is committed to providing the complainant with an environment in which s/he feels safe and free to make an informed choice among the available options and services. As such, complainants may contact SCS counselors, clergy and/or health care personnel who will respect the complainant's confidentiality and anonymity in accordance with their professions and to the extent permitted by law.

When a complaint of sexual violence, sexual harassment and/or stalking is made, SCS will make every effort to maintain the confidentiality of the complainant to the extent permitted by law. While SCS may be able to maintain the confidentiality of the complainant in some instances, it may be required to disclose the fact that such an incident took place for statistical reporting in accordance with the requirements of the Clergy Act and other applicable laws. Complainants should be aware that their desire to maintain confidentiality may limit SCS's ability to conduct a thorough investigation, and to pursue disciplinary action against the alleged perpetrator.

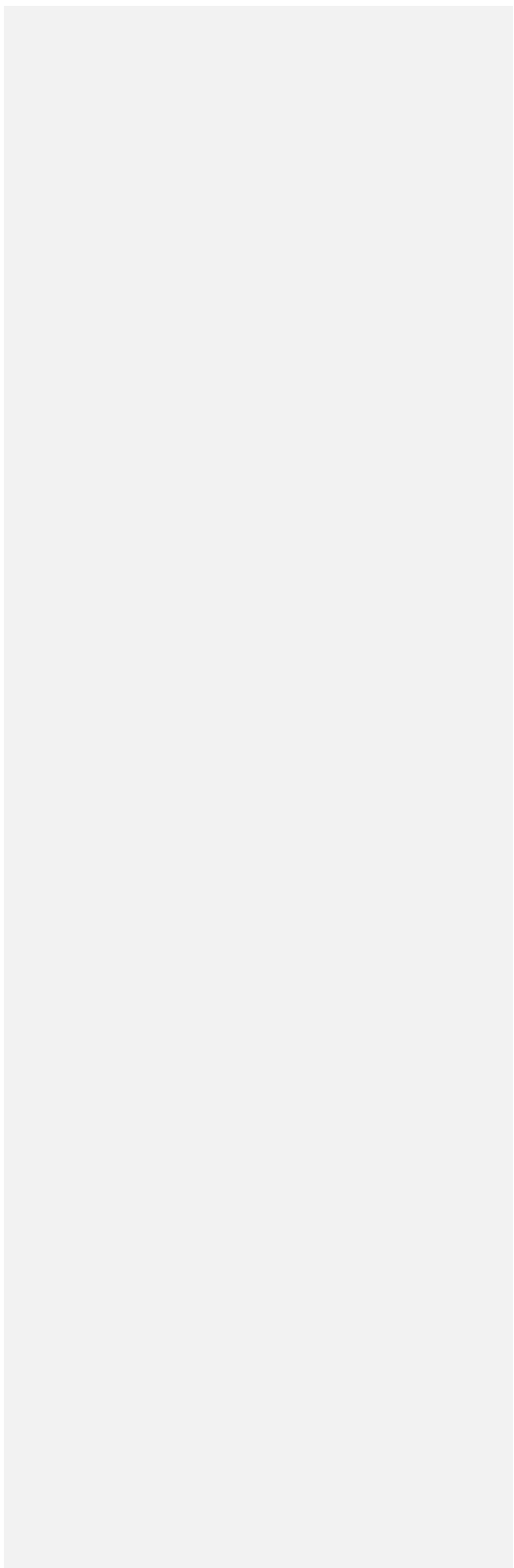
Policy Against Retaliation and Making of False Reports

SCS expressly prohibits retaliation against any student, faculty, staff and/or visitor who makes a good faith report of sexual violence, sexual harassment and/or stalking in violation of this Policy. Members of the campus community who take any adverse action against, intimidate, threaten or otherwise engage in any act of retaliation against someone who has made a good faith report under this Policy will be subject to disciplinary action, up to and including termination of their employment or expulsion from SCS.

Additionally, SCS prohibits members of the campus community from making a false report of a violation of this Policy. Members of the campus community who knowingly and intentionally make a false report of an alleged act of sexual violence, sexual harassment and/or stalking in violation of this Policy will be subject to disciplinary action, up to and including termination of their employment or expulsion from SCS.

Resources for Victims of Sexual Violence, Sexual Harassment and Stalking

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| SCS Department of Safety and Security | 610-785-6238 |
| Office of the Rector | 610-785-6200 |
| ChildLine | 800-932-0313 |
| Lower Merion Police Department | 610-649-1000 |
| Attorney | 610-278-3144 |
| Montgomery County Rape Crisis Hotline | 610-277-5200 888-521-9083 |
| Montgomery County Office of Children and Youth | 610-278-5800 |
| Women's Center of Montgomery County | 800-773-2424 |



APPENDIX XI: LECTOR PROFICIENCY ASSESSMENT

Prior to a candidate's recommendation for Lector he will need to demonstrate through both a written and a walkthrough assessment the following competencies:

- Thorough knowledge of the Introductory Rites, the Liturgy of the Word and LOH:
 - Know and be able to say the specific names and proper ordering of the sub-parts
 - Memorize and be able to repeat aloud the words and prayers the deacon says during those parts
 - Know and be able to demonstrate the proper actions of the Deacon during those parts.
 - Know the proper actions and responsibilities of the Lector, Acolyte, and other servers
 - Prayer of the faithful (in absence of a deacon)
 - Role of Lector in participating in Liturgy of the Hours
- Familiarity and comfort with the Lectionary and LOH
 - Know the major sections within the Lectionary and the purpose of the various volumes
 - Be able to set up the Lectionary for use based on the Ordo
 - Proper vesture
- Awareness and comfortability of liturgical positions and actions
 - Forming an entrance procession and the Lector's position in it
 - Where the Lector should be seated in church
 - Postures and gestures appropriate to lector
 - Carrying the book of Gospels in absence of deacon
 - Proclamation skills

APPENDIX XII: ACOLYTE PROFICIENCY ASSESSMENT

Prior to a candidate's recommendation for Acolyte he will need to demonstrate through both a written and a walkthrough assessment the following competencies:

- Thorough knowledge of the Liturgy of the Eucharist:
 - Know and be able to say the specific names and proper ordering of the sub-parts
 - Memorize and be able to repeat aloud the words and prayers the deacon says during those parts
 - Know and be able to demonstrate the proper actions of the Deacon during those parts.
 - Know the proper actions and responsibilities of the Lector, Acolytes, and other servers
 - Forming an entrance procession and the acolytes position in it
 - proper techniques for using vessels applicable to role
 - Thurifer (thurible / boat / swinging in procession / place in procession)
 - Cross Bearer (holding in procession)
 - Altar server/candle bearer (bows / postures / other gestures)
 - Book bearer (ribbon placement opening the Missal and presenting it to the celebrant)
 - Other Processions (how to form and execute)
 - Knowing the proper names of vessels, vestments, linens, books, etc. used during liturgical celebrations
- Familiarity and comfort with the Roman Missal
 - Know the major sections within the Missal to locate the Mass prayers, prayers for specific feasts, and prefaces, and be able to use the directory in the back of the Missal for special Masses...
 - Ability to set up the Missal for Mass based on the Ordo
- Awareness and comfortability of liturgical positions and actions
 - Preparing the altar
 - Preparing the credence table

- Preparing the offertory table
 - Assisting with the distribution of Holy Communion at Mass
 - Words said in distributing communion
 - Appropriate / Inappropriate actions (no greetings, blessings etc.)
 - Handling of precious blood (use of purificator)
 - Purification of sacred vessels and associated prayer of purification
 - Roles appropriate to acolyte outside of Mass
 - Pastoral care of the sick
 - Assisting at Funeral vigils / committals
 - Assisting at Benediction
 - Exposing / Reposing the Blessed Sacrament for adoration in true absence of priest or deacon
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