

SECONDARY DOCUMENT

VISIT OF CONSULTATION TEAMS TO DIOCESAN PERMANENT DIACONATE FORMATION PROGRAMS

Sixth Revision
Bishops' Committee on the Diaconate
December 2004

PREFACE

This document contains two parts that are closely related yet separate in their application. Included are:

1. The text of the December 2004 Sixth Revision of the Bishops' Committee on the Diaconate (BCD) *Policy Statement: Visit of Consultation Teams to Diocesan Diaconate Programs*.
2. A *Self-Study Instrument*

The Sixth Revision of this BCD *Policy Statement* is based on the 2004 *National Directory for the Formation, Ministry, and Life of Permanent Deacons in the United States*.

The *Policy Statement* is provided as a guide for a diocesan bishop who wishes formally to request a visit of a BCD Consultation Team. Such a visit is an opportunity for dialogue, discussion, and consultation which is summarized in a Consultation Team report to the requesting bishop. The report is confidential in nature. It becomes the property of the requesting bishop to be distributed and used at his discretion. It is offered as a service to a bishop and those to whom he has given the responsibility for the formation of deacons and the post-ordination life and ministry of deacons.

The *Self-Study Instrument* is a guide for a diocese to reflect on the experience of the diaconate and a self-critique of the degree of implementation of the provisions of the United States Conference of Catholic Bishops' 2004 *National Directory for the Formation, Ministry, and Life of Permanent Deacons in the United States*. Such a self-study could be implemented at times when the need becomes evident or as part of the preparation for a visit by a BCD Consultation Team. In that case, the self-study should be accomplished in advance of requesting such a visit. The results should be part of the materials provided to the Consultation Team as they prepare for their visit. The provisions of Appendix I (*Specific Normative Elements in Diaconal Formation*) to the *National Directory* apply.

The members of the Bishops' Committee on the Diaconate hope that these documents will help to strengthen diocesan programs of formation and post-ordination continuing education and spiritual formation of deacons.

Part I

POLICY STATEMENT

VISIT OF CONSULTATION TEAMS TO DIOCESAN DIACONATE PROGRAMS

Sixth Revision
December 2004

I. Introduction

A. The diaconate is an integral part of the entire Christian Community. By means of the document *National Directory for the Formation, Ministry, and Life of Permanent Deacons in the United States* (ND), the bishops of the United States wish to ensure on the part of all involved a more effective preparation for and post-ordination support of diaconal ministry.

As implemented in accord with local or regional resources, this *Directory* will provide a sure directive for promoting harmony and unity in diaconal formation and ministry throughout the United States and its territorial sees. In so doing, this *Directory* will ensure certain uniformity in the identity, selection, and formation of deacons, as well as provide for more clearly defined pastoral objectives in diaconal ministries. (ND, no. 292)

B. The diocesan program for diaconal formation and post-ordination support of deacons are under the immediate supervision of the diocesan bishop, his diocesan director of the diaconate, and other personnel to whom the bishop has entrusted areas of responsibility. To assist diocesan supervisory personnel in the on-going process of improving diaconal formation and making more effective the post-ordination support of deacons, the Bishops' Committee on the Diaconate (BCD) provides this policy statement and appends a suggested *Self-Study Instrument*.

C. One purpose of a visit of a consultation team and a self-study is to assist diocesan personnel to interpret and implement the *National*

Directory. A consultation team can also serve as a two-way channel of information, from diocesan program personnel to the Bishops' Committee and from the Bishops' Committee to the diocese concerning how best to prepare, support, and sustain a deacon and, if married, his wife and family.

D. Earlier revised editions of this policy statement focused on the utilization of a consultation team for improving a diocesan program of formation. This Sixth Revision enlarges the scope of the team to consult on post-ordination continuing education and spiritual formation of deacons and it adds a self-study instrument. This instrument may be employed by diocesan personnel either for diocesan use or in preparation for a visit of a BCD Consultation Team.

E. The BCD Consultation Team is not an accrediting agent. The members of the team function in a diaconal spirit as collaborators with the diocesan bishop, program director, staff, and members of the diaconal community. The common goal is to achieve the objectives of the *National Directory* in adapting them to respond to the needs of the diocese so the deacons will prove to be of assistance to all who share the burden and the privilege of representing the Servant Christ to the Servant Church. (ND, nos. 14-17)

F. Dioceses are encouraged to use the self-study instrument as a guide for an internal evaluation or as part of a process to determine whether or not a visit of a BCD Consultation Team is warranted.

G. Circumstances that could warrant a request for a consultation team include the following:

1. When a deacon formation is to be introduced or substantially modified
2. When major program changes are contemplated
3. When activating a program which has been "on hold" for more than two years
4. When a new bishop has been appointed to a diocese
5. After every ten years of formation activity
6. When implementing or modifying a post-ordination program of supervision and support of deacons, their wives and families (no. 14; 16)

II. Initiating a Request for a Consultation Team Visit

A. The process begins with a written invitation by a diocesan bishop to the chairman, Bishops' Committee on the Diaconate, requesting that the BCD provide a Consultation Team to visit his diocese. A choice of three dates should accompany the request. Ordinarily, a minimum of six months should be allowed between the invitation and the beginning of the visit of the Consultation Team. In the event that a deacon formation program is established in a religious institute, the invitation for a team visit would come from the major superior.

B. In his invitation, the requesting bishop should specify his reason(s) for requesting the consultation so that team members will have clear guidance concerning the reason for their visit. If possible, the visitation should be timed to take advantage of scheduled diaconate events. The character of the formation program and the development of the diaconate in the requesting diocese will provide a basis for the scope of the consultation, and local circumstances will be considered in determining the composition of the team.

III. BCD Response to a Consultation Request

A. Upon receipt of the requesting bishop's invitation in the Secretariat, the assembling of the Consultation Team is the responsibility of the Executive Director. When composition of the Team is completed, the names will be proposed to the requesting bishop for his approval.

B. Members of the Consultation Team should possess competence in the areas of spiritual, pastoral, and academic formation, as well as an understanding of various types of program administration. The character of the diaconate of the requesting diocese should be taken into account: regional, ethnic, social identity, administrative, or any other factors which distinguish a program's goal or process.

C. The chair of the Consultation Team will be a bishop who is a present or past member of the Bishops' Committee on the Diaconate. Team members will include two directors of active diocesan deacon programs, one of whom is a deacon, and a deacon

couple who are active in pastoral ministry. Ideally, all team members will be from dioceses where there is an active diaconate program. If the situation requires it and the requesting diocese has the financial means of funding, additional personnel will complement the members of the Consultation Team.

D. Every effort will be made to include one person who has served previously on a consultation team. Because of previous experience, the chair could utilize this person as a Special Facilitator. This Facilitator could help the diocesan director prepare for the consultation through conference calls, FAX, e-mail, or letter, especially in standardizing or streamlining the process of preparing the documentation needed by the team and in the scheduling of persons or groups who will participate in the consultation.

- a. Once the composition of the team has been accepted by the requesting diocesan bishop, communication relation to the Team visit and consultation will be between the Team chair and the requesting bishop and his diocesan director of the diaconate. The Team chair will consult with his Team members concerning arrival times at the consultation site and estimated times of completion of the Team visit. These times will be coordinated with the requesting bishop and his diocesan director of the diaconate.

IV. Diocesan Preparations for a Consultation

A. At least one month in advance of the visitation, the diocese will prepare a Background Questionnaire, a copy of which is appended to this *Policy Statement* as Appendix A.

B. In addition, the following materials must be provided to each Consultation Team member so they might initiate internal team planning in advance of their visit:

1. A statement describing how the deacon formation program and post-ordination programs of continuing education and spiritual formation conform to the provisions of the 2004 *National Directory*.
2. The results of a self-study, based on the response to the questions outlined in a *Self-Study Instrument*, a copy of which follows this *Policy Statement*.
3. Published materials that describe the deacon formation program, including the original design for formation, diaconal life, and ministry previously approved by the BCD; any revisions of the original design, which could include course descriptions, program bulletins, the results of previous self-studies, evaluations, and recommendations that may have emanated from them; goals and plans for future programming; and copies of minutes from recent board meetings.

C. The requesting diocesan bishop and the Team chair will collaborate, as necessary, in planning for the consultation progresses.

D. The diaconate staff of the requesting diocese will arrange local transportation, housing, and meals for the Consultation Team members throughout their visit.

V. Individuals and Groups to be Consulted

A. In planning the schedule for the Consultation Team visit, the diaconate staff of the requesting diocese will identify those individuals or groups to be interviewed by Team members during their visit. The following individuals/groups are suggested:

1. The diocesan bishop, other bishops, Vicar General, Chancellor, religious superiors
2. Deacons and wives, either together or separately
3. Deacon candidates and wives, either together or separately
4. Children of permanent deacons and candidates, when available and appropriate
5. Formation program faculty, including staff of a wives' program if integral to the program
6. Diaconate and formation board members;
7. Other diocesan personnel deemed appropriate by diocesan planners
8. Representatives of deacon structure (council, assembly, etc.)
9. A cross-section of priests, men and women religious, and laity who collaborate with deacons in ministry
10. Pastors and others who supervise deacons in ministry

B. In conferring with the above persons, Team members will take into consideration the various relationships they have to the deacon formation program and to diaconal ministry in the diocese.

C. In assigning Team members for interviews, the Team chair will give consideration to the effectiveness of peer interviews—bishop to bishop, diaconate director to diaconate director, wife of deacon to wives of deacons, priest to priest, deacon to deacon.

VI. Conducting the Consultation

A. Purpose

1. To provide the diocesan bishop with an assessment of the diocesan program of formation and the post-ordination life and ministry of deacons, based on principles contained in the 2004 *National Directory*, as adapted and implemented to respond to the needs of his diocese
2. To offer constructive suggestions or recommendations to help strengthen the programs or make them more effective
3. To help interpret current trends in diaconal ministries
4. To serve as a channel of communication for the Bishops' Committee on the Diaconate

B. Methods

The consultation process will be guided by one basic question, How is the diocesan diaconate fulfilling its objectives in light of the *National Directory*, taking into consideration the suggestions, recommendations, or conditions made by the Bishops' Committee on the Diaconate at the time of their approval of the diocese's diaconal program?

The diocesan staff and Consultation Team members will focus their efforts on the following questions:

1. What are the goals of the formation program?
2. What is the content of the formation program in each of the areas outlined in the USCCB *National Directory*? (see Part II *Self-Study*)
3. How is the *National Directory* being implemented and adapted in each of the above areas?
4. What educational and formational processes described in the *National Directory* are utilized or have been adapted for use in the diocesan diaconate program?
5. How have these processes been adapted to meet the geographic, cultural, ethnic, educational, and ministerial needs and resources of the diocese?
6. How effective are the processes used by the diaconal formation program in achieving its goals?

C. Duration of Consultation Visit

Ordinarily, a period of at least three full days should be spent evaluating a diaconate program by the Consultation Team. A fourth day is optional and may be scheduled, if deemed necessary, by the Team. During the visit, the members of the Team should try to participate, as fully as possible, in the diaconal community life. In the case when a “weekend format” is used for the consultation, the visit would be scheduled on a regular formation weekend. In the case of a weekly “night school” format, a “class night” ideally would be included in the visitation.

In addition to the three-day Team visit, it could be helpful if one member, perhaps the Special Facilitator (see no. III D) could be present for a period of time, in advance of the others, to assist the diocesan staff in final preparations for the consultation.

Since the purpose of the consultation is for peer support and assistance, it is crucial that an atmosphere of total cooperation and mutual trust be fostered between members of the Consultation Team and the diaconal community.

D. Suggested Consultation Schedule

Each evening of the visit, the chair will assemble the Team to assess the work of the day and identify what remains to be done. Every effort should be made by the host personnel to house the Team members in one facility to reduce travel time and facilitate the Team’s efforts. At times during the visit, private dinners for the Team alone may provide a relaxing respite from the rigorous schedule of the consultation and offer an opportunity for a bonding of the Team members. In addition, team meals give members a chance in a relaxed atmosphere to discuss various aspects and plans and schedule adjustments in the visitation process. Meals may also be shared with one or more of the groups to be interviewed or with the requesting bishop and other diocesan personnel.

An outline for a sample schedule is appended to this *Policy Statement* as Appendix B.

VII. Providing Feedback, Preliminary Reports, and the Final Consultation Report to the Requesting Bishop

A. When giving feedback, preparing preliminary reports, or writing the final consultation Team report, the chair and Team members will distinguish between their objective observations of a diocesan program's compliance with the provisions of the *National Directory* and their personal observations. The Team's objective observations will provide the basis of the report on each area of the diaconal program, their commendations and recommendations, and the basis for the Team's final report of the consultation.

B. During the consultation, Team members may make suggestions based on their own experience. Since the focus of the Consultation Team is an evaluation of a diocesan program's adherence to the provisions of the *National Directory*, however, any recommendations made to the diocesan staff will focus on helping the diaconate staff either to comply with or adapt the provisions of the *National Directory* to their specific needs.

C. The preliminary oral report and the final written report of the Consultation Team provide a constructive assessment of the degree to which local implementation and adaptation of the *National Directory* have been made. Recommendations are offered to help strengthen deacon formation, post-ordination diaconal life, and ministry in the diocese. Subsequently, any changes made in a local program in order to implement the Team's recommendations will be determined by the diocesan bishop and carried out by the staff.

D. Prior to the departure of the Consultation Team, a preliminary oral report will be made to the requesting diocesan bishop and/or his director of the diaconate and others the bishop may elect to invite. The manner and details of this presentation will be the responsibility of the Team chair. The oral report includes impressions and tentative conclusions of the Team members. This is the time to clarify any ambiguities, either on the part of the Team or of the requesting bishop and his staff.

E. The final written report

1. The requesting diocesan bishop should receive a written report within one month following the conclusion of the consultation.
2. Each Team member will prepare a report on those areas of the program assigned to him or her. Duplications or possible contradictions will be minimized through consultation among Team members. Each Team member should send a typed copy of his/her report of assigned areas of responsibility directly to the Team chair within one week of the conclusion of the consultation.
3. The Team chair will assemble an integrated report, objective and based on fact, and a brief introduction to the report.
4. Each section of the report should consist of three parts:
 - A general description
 - Commendations (highlighting program strengths)
 - Recommendations (action to bring formation and post-ordination diaconal life and ministry into conformity with the provisions of the 2004 *National Directory*)
5. The Team Report is mailed to the Secretariat where it is reproduced and distributed to the Committee members for their comments, and approval/disapproval. When approved, the report will be sent to the Diocesan Bishop under a cover letter from the chairman, BCD. The report then becomes the property of the requesting diocesan bishop, to be utilized as he sees fit.

VIII. Reimbursement and Remuneration

A. The requesting diocese is expected to cover the following costs of Team members:

- Transportation
- Accommodations
- Miscellaneous expenses (meals, airport transfers, etc.)
- Stipend of \$50 per day for each team member

B. Consultation Team members will submit supporting documents to a person designated by the requesting bishop within seven days following the Team's visit. Reimbursement of Team members and payment of the stipend should be accomplished within thirty days following completion of the consultation visit. A suggested reimbursement form is appended to this *Policy Statement* as Appendix C.

C. As a matter of justice, the wife of the deacon is considered an individual member of the Consultation Team. Her stipend will be independent of that of her deacon husband.

APPENDIX A

Background Questionnaire for Visit of Consultation Team

Bishops' Committee for the Diaconate

This completed questionnaire should accompany the initial request from a diocese when requesting a Consultation Team Visit to a local diaconate program. A similar cover sheet accompanies the self-study instrument, which is submitted prior to the visitation.

Date _____

(Arch)Diocese _____

Diocesan (Arch)Bishop _____

Address _____

Telephone, FAX _____

E-mail _____

Address, Telephone, FAX, E-mail of the Office of the Permanent Diaconate, if different from above _____

Preferred Dates Desired for visitation

(1) _____ (2) _____ (3) _____

Diaconate Director (s)

(Title/Name) _____

(Title/Name) _____

(Title/Name) _____

(Title/Name) _____

Local Diocesan Structure for Permanent Deacons, e.g. Board, Association, etc.

Number of Permanent Deacons in Diocese _____

Current Formation Program ☐ Yes ☐ No

If yes, number of candidates in formation _____

Date Deacon Formation first began in diocese _____

Is copy of original approved program available? ☐ Yes ☐ No

Length of Program of Formation _____

Model of Program of Formation (weekly, monthly, urban, rural, cultural factors, etc)

Site of Formation Program (facility & location) _____

Diaconate Formation Staff and their Qualifications

Human Formation _____

Academic/Intellectual Formation _____

Spiritual Formation _____

Pastoral Formation/Field Education _____

Program for Wives _____

Please indicate what circumstances warrant a request for a consultation team visit at this time.

- ☐ Diaconal formation program is being introduced under 2004 *Directory*
- ☐ Diaconal formation program has been substantially modified under 2004 *Directory*
- ☐ Diaconal formation program changes are contemplated in the future
- ☐ Activating a formation program which has been "on hold" for more than two years
- ☐ A new bishop has been appointed to the diocese
- ☐ The formation program has been active for ten years
- ☐ The program of supervision and support of permanent deacons, their wives, and their families is being implemented or modified

The name, address and phone number of person responsible for paying the travel, room and board, and stipend (suggested \$50.00 per day per member) for each member of the Consultation Team. See Appendix C for

Reimbursement Report.

Name

Address

Phone Number

E-Mail

APPENDIX B

Sample Schedule

At the discretion of the consulting team and the diocesan staff, the following sample schedule may be adjusted for a weekday or weekend consultation, or for an urban or rural program.

Day of Arrival

Arrival of team in time for a 5:00 p.m. meeting to discuss the visitation schedule and to review preliminaries on the *Self-Study*. The team will determine the division of work for the visit, emphasizing the use of the *National Directory* as the basis for the consultation.

Evening: Orientation meeting with the diocesan bishop and/or the diaconate director(s)

Purposes: To provide an overview of the diocese, a history of the diaconate in that diocese, and to determine to whom the final oral report is to be given.

First Day

A.M.: Meeting with the formation faculty and diaconate program staff (e.g. coordinators of the theological, spiritual, and pastoral formation components, coordinator of wives' program, coordinator (s) for specific ethnic and cultural programs, etc.)

Purposes: To discuss the goals and objectives, developments, and concerns of the programs' leadership regarding diaconal formation, post-ordination support, and the ministry and life of permanent deacons.

P.M.: Peer interviews between bishops, diaconate directors, priests, candidates, deacons, wives, and children, etc. (see VI, D)

Purposes: For team members and diocesan staff to discuss in depth their responsibilities, observations, and concerns.

Evening: The team will review the areas that have been investigated, plan the division of work for the following day, and identify areas for further exploration and evaluation.

Second Day

A.M.: Visitation of formation and continuing education classes, ministry settings, and communities served by the diaconate. When possible, determine selection of classes and pastoral experiences to be observed, by consultation with diaconate administrative staff, but not necessarily restricted to these.

Purposes:

1. To establish first-hand contact with the processes/settings for learning diaconal ministry.
2. To determine the quality of teaching in the formation program. These visits, together with participation in the liturgy, validate the self-study and verbal accounts provided by the diocesan staff.

Meetings with other resource personnel. They could be invited to come to a central location such as a diocesan or parish center for these meetings.

Purposes: To complete the information-gathering phase of the team visit and to gain a thorough understanding of the diaconate in this setting.

Evening: The team will discuss the tentative commendations and recommendations that seem to be emerging from the investigation. The chair will stress the importance of completing the written report on time, and sending copies of it to the Secretariat for the Diaconate within two weeks of the visitation.

Third Day

A.M.: Discussion and consensus among the members of the consulting team.

PM.: Preliminary oral report to the diocesan bishop, directors, and perhaps others, determined by the bishop. This report will consist of preliminary observations. It will be factual in nature and will not involve any final evaluative judgment, nor will it invite any kind of response other than to clarify factual and observable information.

Fourth Day (Optional)

This day may be utilized to complete additional segments of the visit, for team members to prepare their reports, or for the chair to give the preliminary oral report, as described above. Team departs.

APPENDIX C

Reimbursement Report Consultation Team Visit

Bishops' Committee on the Diaconate

Upon completion of the Consultation Visit, each team member fills out this form to account for and request remuneration of expenses incurred as part of the consultation team visit. The member mails the request within seven days to the diocesan office of the diaconate at the site of the visit or to the person/office designated by the host diocese. A copy is also mailed to the USCCB Secretariat for the Diaconate. The diocese arranges for reimbursement within thirty (30) days.

Date _____

Team Member Name _____

Address _____

City, State, Zip _____

Telephone(s) _____

FAX _____ E-MAIL _____

Site (Diocese) of Visit _____

Dates of Visit _____

Expenses Incurred (attach receipts)

Airfare _____

Auto (.304 per mile) or Rental _____

Stipend (\$50.00 per day) _____

Miscellaneous Expenses

+Meals _____

+Airport Transfers _____

+Other Expenses (be specific) _____

TOTAL EXPENSES _____

-ADVANCES RECEIVED _____

TOTAL REIMBURSEMENT _____

Signed _____
(Consultation Team Member)

Approved _____
(Diocesan Personnel)

cc: USCCB Secretariat for the Diaconate

Part II

Self-Study Instrument

Visit of Consultation Teams to Diocesan Diaconate Programs Sixth Revision December 2004

The *Self-Study Instrument* is designed to guide each diocese in a thorough assessment of its diaconate programming, using the 2004 *National Directory for the Formation, Ministry, and Life of Permanent Deacons in the United States*.

The *Self-Study Instrument* may be completed independently by a diocese as an internal assessment of compliance with the *National Directory*. It is always prepared as part of the visit of a BCD Consultation Team, which is described separately in the *Policy Statement*.

Within the context of this *National Directory*, Appendix I *Specific Normative Elements in Diaconal Formation* highlights elements to plan, implement, and evaluate a diaconal program. In this *Self-Study Instrument*, the number(s) in parentheses all refer to paragraph numbers in the *National Directory*.

When a bishop submits a proposal to the Bishops' Committee on the Diaconate for review, he should provide descriptive information on the normative elements for formation, ministry, and life of deacons as outlined in Appendix I of the *National Directory*, which is included with this self-study instrument.

Each section of the *Self-Study Instrument* then goes on to assesses the diocese's compliance with or adaptation of the norms established by the BCD, which are described in parallel sections of the *National Directory*.

In completing a *Self-Study Instrument*, questions may be answered individually or answers may be combined in narrative form to achieve greater continuity. Additional descriptive information may be added to what is elicited by the *Self-Study Instrument* in order to more accurately present the diaconate program of a diocese.

APPENDIX I

Specific Normative Elements in Diaconal Formation

I. Introduction

This section has been added to highlight the specific normative elements that ought to be part of the planning, implementation, and evaluation of a diaconal program. They need to be interpreted within the intent and context of this *Directory*.

II. Specific Normative Elements to Include in a Proposal for Review

When a bishop submits a proposal to the Bishops' Committee on the Diaconate for review, he should provide descriptive information on the following normative elements for the formation, ministry, and life of deacons:

- The diocesan pastoral plan clarifying the deacon's identity, role, and function in diocesan pastoral ministry
- The catechesis on the diaconate, covering content and process for its clergy, religious and lay staff, and the lay faithful of the diocese
- The organization and structures established within the diocese
- The academic/professional competencies, including the names and background of the administration, primary faculty, mentors, and other formation personnel selected to plan and implement the program, as well as the orientation program for the staff to the diaconate and diaconal formation
- The recruitment process, a collaborative activity of the departments for vocations, diaconal formation, and parochial pastors
- The recruitment processes to be employed in inviting applicants from communities reflecting the ethnic, racial, and cultural diversity of the diocese, including a copy of recruiting guidelines, materials, and application forms
- The screening procedures, particularly the psychological and personality testing that may be used—a list of the instruments, how they will be interpreted, and by whom

- The selection process, including the advisory structures that will make recommendations to the bishop, particularly the committee on admission and scrutinies, with its proposed composition and charter, if available
- The incorporation of the human, spiritual, intellectual, and pastoral dimensions of each path in diaconal formation; the engagement of participants in the pastoral ministries of the diocese and specific parishes
- The aspirant path in formation, specifying program length, formation contact hours, general content, the model of formation chosen, linkage with other diocesan formation programs (if any), assessment procedures, a list of those who will guide this path in formation and their professional competencies, and the aspirant's handbook (if available)
- The candidate path in formation, specifying program length, formation contact hours, course descriptions, and methodology in compliance with the directives specified in the *Basic Norms for the Formation of Permanent Deacons* and this *Directory*, a list of the faculty and their academic/professional competencies, the model(s) chosen for formation, assessment procedures, a list of prescribed textbooks, and the candidate's handbook (if available)
- A declaration from the bishop regarding the verification of courses of study obtained through distance learning or Internet seminars
- The program for spiritual formation in each path in formation; the name and competencies of the spiritual director
- The level and content of the involvement of wives and families in the formation program, including any requirement policy for wives' participation
- The deacon personnel director and his competencies; the structures envisioned for the post-ordination path in formation; the provisions for the pastoral care of deacons in their ministry and life after ordination; the program for the newly ordained; supervision and review of the decree of appointment; assessment procedures; continuing spiritual, intellectual, and pastoral formation, as well as personalized training; ongoing formation programming for wives and families; special care for deacons who are ill, widowed, and retired, and also for widows of deacons; inclusion of deacons within diocesan structures; a copy of the form used in preparing the written ministerial agreement

- A description of the application of particular law governing deacons, as approved by the United States Conference of Catholic Bishops and applied within the diocese
- A copy of the deacon personnel policy handbook, with policies and procedures governing post-ordination diaconal ministry and life (if available)
- Plans for a regularly scheduled assessment of the formation program
- Procedures employed for maintaining a list of deacons with their ministerial assignments; pastoral care of retired or widowed deacons, as well as those living outside of the diocese

(National Directory for the Formation, Ministry, and Life of Permanent Deacons in the United States, Appendix I)

Administration

The establishment or renewal of diaconal ministry within a diocesan Church needs to be conceived and established within an overall diocesan plan for ministry in which the diaconate is seen as an integral component in addressing pastoral needs. In this way, deacons, who are ordained for service to the diocesan Church, will have a richer and firmer sense of their identity and purpose, as will those who collaborate in ministry with them. (*National Directory for the Formation, Ministry, and Life of Permanent Deacons in the United States*, no. 257)

1. How does the diaconate contribute to the overall pastoral plan of the diocese? (no. 257) How does the formation program prepare candidates to meet this need?
2. What is the mission of the permanent diaconate in the diocese? (no. 41) Are diocesan diaconal leaders familiar with the *National Directory for the Formation, Ministry, and Life of Permanent Deacons in the United States*? (nos. 14-17)
3. What is the operative definition of “deacon” in this local church? How are deacons utilized? (nos. 27-30)
4. How does the diaconate reflect the cultural reality and diversity of the local church? (nos. 144-145)
5. Describe what geographical, ethnic, and cultural demographics affect the style and formation of diaconal formation and ministry in the diocese (nos. 161-164).
6. Describe the ongoing efforts at catechesis in the diocese regarding diaconal ministry (no. 43).
7. What is the relationship of the diocesan diaconate office to the bishop? (nos. 41-47) Describe the responsibilities of the members of the diocesan diaconate staff. (nos. 271-276) What is the relationship of the faculty to the diocesan staff? to the candidates? (nos. 277-279) What are the responsibilities of any board related to the program of formation or post-ordination diaconal life and ministry? (nos. 281-291)

8. Describe the diocesan commitment to provide adequately trained personnel to administer the diaconate program? (nos. 281-291)

For the Administration category, please check the rating which best describes your overall assessment.

- ☐ A. Programs, plans, and activities are adequate or better than adequate in this category.
- ☐ B. Additional development and/or revision is needed in the following components of this category.
Indicate number(s) _____
- ☐ C. This category will require significant restructuring and/or redesign.

The Formation Program
for Aspirancy, Candidacy, and Post-Ordination, and the
Dimensions—Human, Spiritual, Intellectual, and Pastoral
(including Liturgical Components)—of the Formation Program

1. What are the goals and objectives of the program of formation for aspirancy, candidacy, and ongoing formation? Describe the program of formation for each of the areas listed. How does each area of the program implement the *National Directory*? Describe the strengths and weaknesses in each of these areas (nos. 104-133; 188-197; 214-219; 241-249).
2. How is each path and dimension integrated with the others? How does each path and dimension contribute to (a) the spiritual development of the candidate? (b) the formation of community? (c) the service dimension of diaconate? (d) the pastoral dimension of diaconate? Does each year of formation include a social justice component that is integrated with different academic subjects? (nos. 149-150) How is this integration achieved? (nos. 188-197; 214-219)
3. Describe how the model of the formation program and its content is adapted to the geographical, social, economic, and cultural circumstances of the diocesan church, as characterized by the availability of staff and resources (nos. 144-145; 161-164; 261-265).

4. How are educational approaches used, consistent with effective methods of adult education? What adaptations are made through creative uses of modern technology, teaching techniques, instructional materials, traveling teams, etc? (no. 73; 74)
5. How are the needs of the society and culture in which candidates will be serving identified? What preparation is given to respond to such specific needs? (nos. 161-164)
6. Describe how subjects listed for each area of formation meet the needs of the local church and cultures, and are integrated with the formation program (nos. 193-197).
7. Who constitutes the faculty for the program of formation? What are their qualifications? What arrangements exist for the faculty to meet regularly for planning and feedback regarding the candidates? (nos. 277-279)
8. Describe what opportunities are provided for candidates to form small communities in order to take part in theological reflection (no. 133).
9. Describe the field education and internship opportunities offered during the formation program (no. 132; 197; 219).
10. Describe what opportunities are provided for practicums and gaining competency in pastoral ministry skills, homiletics, liturgy, and as a public leader of prayer (no. 130).
11. If the formation program is accredited in some manner, describe how this is accomplished.

For the Formation Program during Aspirancy, Candidacy, and Post-Ordination: Human, Spiritual, Intellectual and Pastoral Dimensions (including Liturgical Components) category, please check the rating which best describes your overall assessment.

- ☐ A. Programs, plans, and activities are adequate or better than adequate in this category.
- ☐ B. Additional development and/or revision is needed in the following components of this category.
Indicate number(s) _____
- ☐ C. This category will require significant restructuring and/or redesign.

Vocation, Discernment, and Selection of Candidates

1. What written materials or opportunities for catechesis exist for potential applicants to receive accurate information about the diaconate? How are potential candidates identified? (nos. 159-160)
2. In the admissions process, how are the following criteria determined for each applicant? (nos. 165; 173; 66.16)
 - a maturing Christian faith
 - personal integrity
 - appropriate maturity
 - holiness
 - regular participation in the Church's sacramental life
 - evidence of previous and respected commitment to the Church's life and service
 - a stable marriage and family life
3. Describe other criteria (level of education, age, etc.) necessary for an applicant to be favorably considered for acceptance into the diaconate formation program? (nos. 174-175; 177)
4. What documents are all applicants required to provide as part of their application? (no. 178)
 - certificates of Baptism, Confirmation, and if appropriate, marriage
 - health evaluation
 - if appropriate, written statement of wife's consent
 - letters of recommendation
 - age requirement
 - impediments; background check

5. What other documentation, interviews, and psychological assessment are required of applicants, and where appropriate, of their wives? (no. 178a-1)
6. What ethnic, cultural, and geographic considerations are made in the diaconate selection process? (nos. 161-162; 164)
7. Describe how wives are involved in the application and screening processes (no. 170).
8. Describe the process of discernment (nos. 165-166; 168; 169-173; 179).
9. How is the discernment of readiness for the aspirancy path assessed? Is this recommendation forwarded to the bishop for his approval? (nos. 179-181)

For the Vocation, Discernment, and Selection of Candidates category, please check the rating which best describes your overall assessment.

- ☐ A. Programs, plans, and activities are adequate or better than adequate in this category.
- ☐ B. Additional development and/or revision is needed in the following components of this category.
Indicate number(s) _____
- ☐ C. This category will require significant restructuring and/or redesign.

Assessment and Evaluation During Formation

1. Describe how the local Church discerns and ratifies the call to diaconal ministry (nos. 153-154; 227-231; 243; 266; 284).
2. Describe the assessment processes used during the aspirancy and candidacy paths of formation. Who participates in the evaluation process? How does the evaluation process need to be strengthened? (nos. 198-200; 205; 209; 220-230)

3. Describe the criteria for assessing readiness to nominate into the candidate path. (nos. 198-203); human (no. 189); spiritual (nos. 191-195); intellectual (no. 196); pastoral (no. 197).
4. How are candidates held accountable for their performance in their theological/intellectual formation? (nos. 115-125)
5. What criteria are used for assessing the pastoral skills (including liturgical skills) of a candidate as a consideration of his fitness for ordination? (nos. 126-133)
6. How does the formation program help the candidate with the goals for spiritual development? (nos. 110-117)
7. What are the criteria for readiness for institution to the ministries of lector and acolyte? (nos. 232-234)
8. What are the criteria for assessing the candidate's suitability for ordination? How are candidates called to Orders? (nos. 225-231)
9. What processes are used following ordination to evaluate the deacon's ministry? How often and by whom? Are such evaluations made part of the deacon's permanent personnel recall in the diaconate office? (nos. 245-249)

For the Assessment and Evaluation category please check the rating which best describes your overall assessment.

- ☐ A. Programs, plans, and activities are adequate or better than adequate in this category.
- ☐ B. Additional development and/or revision is needed in the following components of this category.
Indicate number(s) _____
- ☐ C. This category will require significant restructuring and/or redesign.

Family Life Perspective

1. In what ways is the overall health of each candidate's marriage and family assessed during the selection process and throughout formation? (nos. 136-143; 175; 185; 190; 192; 198; 200; 212; 217e)
2. How does the program of formation address the issues of marriage and family? What effort is made to evaluate the home environment and family relationships of the candidates? (no. 175; 190; 212)
3. How are the wives and families included in the program of formation? (nos. 192; 234; 236-237)
4. How are the candidates' wives and children helped to understand and adjust to the demands of diaconal ministry undertaken by their husbands and fathers? (no. 44; 47)
5. What support exists to meet the needs of wives and children before and after ordination? What areas of this support need to be strengthened? (nos. 94; 243-244)
6. How are the charisms of the wives identified, enhanced, and utilized in ministry? How are they integrated into the collaborative parish/agency effort to serve? (no. 192)
7. Describe how diaconal formation and ministry offer opportunities for the marriage bond to be enriched by the Sacrament of Holy Orders, just as public ministry is enriched by married ordained ministers. (nos. 66-68; 139; 186; 246)
8. How are the restrictions on remarriage of the deacon after the death of his spouse explained? (no. 69; 75; 216) How does the program explore with candidates the permanency of the Order of Deacon? (no. 77; 99)
9. What provisions are made for the continued support and participation of the widows of deacons and for their material and emotional support? (no. 74)

10. How does the formation program explore with candidates the nature and extent of the obligation of a deacon's lifelong promise of obedience to the diocesan bishop and the implications of this promise for his ministry and marriage? (nos. 30; 41-43)

For the Family Life Perspective category please check the rating which best describes your overall assessment.

- ☐ A. Programs, plans, and activities are adequate or better than adequate in this category.
- ☐ B. Additional development and/or revision is needed in the following components of this category.
Indicate number(s) _____
- ☐ C. This category will require significant restructuring and/or redesign.

Ministry and Life after Ordination

Ministry and Life of the Permanent Deacon

1. Describe how ministry assignments are made. Describe the ministry agreements or covenants and how responsibilities are delineated. What period of time do they cover? (no. 42; 44; 93)
2. Describe what structures are available to co-ordinate and provide mutual support to deacons and wives, and to nourish and maintain community among deacons, (e.g. through the deaneries, regional, or diocesan diaconal communities, placement, etc.) (nos. 47; 54; 260; 286-291).
3. Describe any diocesan policies regarding ecclesiastical garb and titles to be used by deacons. Describe how these policies enhance or restrict the deacon's relationship with others (nos. 88-89).
4. How does diaconal life and ministry in the diocese integrate the three general areas of diaconal ministry: Word, sacrament, and charity? (nos. 31-40; 79-84)

5. Describe the types of ministries deacons are involved in. Are these ministries consistent with the service/charity ministry of the deacon? (no. 48)
6. Describe how deacons are involved in collaborative ministry and are enablers of others in ministry (nos. 50; 55-56).
7. Is there a diocesan council or assembly of deacons? How are members chosen? Are wives represented? What are the responsibilities of this body? To whom are they accountable? (nos. 290-291)
8. How are deacons and wives involved in coordinating and planning for diocesan diaconate ministry and formation? (no. 281; 285; 289)
9. How are deacons considered and appointed to diocesan boards, committees and councils for planning and dialogue? (no. 49)
10. What policies exist concerning remuneration and benefits for deacons engaged in part-time and full-time ministry? (nos. 94-95)
11. Do deacons receive appropriate remuneration for the expenses incurred in the exercise of their ministry? (no. 96)
12. Describe how deacons are involved in the ministries of word and sacrament (nos. 79-83).
13. How does the diaconate community reflect the cultural reality and diversity of the local church? (nos. 161-164)
14. Describe what opportunities are provided for deacons to deepen and nurture their spirituality (nos. 62-64).
15. What provisions are there for integrating the ethnic, racial, cultural, and geographic communities with the mainstream of the diaconal community? (nos. 144-145)

16. How are deacons informed of their canonical responsibilities and obligations, as well as their canonical rights, by virtue of being incardinated in the diocese? Do deacons receive a written statement from the diocesan bishop identifying their canonical faculties? (nos. 42; 44-45)
17. Describe how deacons are made aware of the diocese's incardination and excardination policies (no. 78).
18. Do clear policies exist for a deacon who is moving to another diocese or for a deacon who is moving into the diocese? (no. 102)

For the Ministry and Life After Ordination category please check the rating which best describes your overall assessment.

- ☐ A. Programs, plans, and activities are adequate or better than adequate in this category.
- ☐ B. Additional development and/or revision is needed in the following components of this category.
Indicate number(s) _____
- ☐ C. This category will require significant restructuring and/or redesign.

Post-Ordination Path in Diaconal Formation

1. Describe the program for newly ordained (nos. 46; 250-252).
2. Describe the diocesan post-ordination program (nos. 42; 239-256).
3. What provisions are made for the continuing formation, spiritual growth, and supervision of deacons and wives? How is the deacon held accountable for continuing formation/education in each dimension: human, spiritual, intellectual, and pastoral? (nos. 251; 285-289)
4. What dimensions of continuing formation need to be strengthened? (nos. 241-249)

5. Is regular supervision provided for deacons? How and by whom?
(no. 251)
6. What formation or training is provided for such supervisors?
(nos. 251; 285-289)

For the Post-Ordination Path category please check the rating which best describes your overall assessment.

- ☐ A. Programs, plans, and activities are adequate or better than adequate in this category.
- ☐ B. Additional development and/or revision is needed in the following components of this category.
Indicate number(s) _____
- ☐ C. This category will require significant restructuring and/or redesign.

Relationships with Priests, Religious, and Laity

1. Describe the continuing catechesis on diaconal ministry, to assist the bishop, priests, religious, and laity to discern the needs and challenges of the local church (no. 43).
2. How is the diaconate presented and integrated with other ministries in the diocese? (nos. 48-49; 61)
3. What is the attitude of the local community, including laity, priests, and religious, toward the diaconate? (nos. 58 and 61)
4. What opportunities exist locally and within the diocese for deacons and priests to nurture a genuine respect for each other, while recognizing the integrity of their two distinct ministries? (no. 52)
5. How has the presbyterate received an appropriate catechesis about the diaconate? (no. 53)
6. How does the presbyterate support the ministry of deacons? (nos. 50-53)

7. How do deacons take an active role in promoting and inspiring the participation of the laity in the Church? (nos. 56-57)
8. Describe the relationship between deacons and women religious in the diocese. (no. 55)

For the Relationships with Priests, Religious, and Laity category please check the rating which best describes your overall assessment.

- ☐ A. Programs, plans, and activities are adequate or better than adequate in this category.
- ☐ B. Additional development and/or revision is needed in the following components of this category.
Indicate number(s) _____
- ☐ C. This category will require significant restructuring and/or redesign.

