

# Diaconate Formation Policy Handbook



2023

**The Roman Catholic Archdiocese of Santa Fe**

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## I. Vocation, Discernment and Selection

**Vocation:** From the experience of the restored diaconate in the United States, certain behavioral patterns have been discerned among exemplary deacons: a “natural inclination of service to the . . . Christian community,” and to all in need; psychological integrity; a capacity for dialogue, which implies a sense of docility and openness; the ability to share one’s faith yet listen respectfully to other points of view; the capacity to listen carefully and without prejudices—respecting people in the context of their religion, race, gender, ethnicity, and culture; good communication skills; a sense of responsibility that includes the fulfilling of one’s word and completing one’s work; self-directed and collaborative accountability; balanced and prudent judgment; generosity in service; and the ability to lead, motivate, facilitate, and animate others into appropriate action and service.

The profile is completed with certain spiritual and evangelical qualities. Among these are a sound faith; good Christian reputation; active involvement in the Church’s apostolate; personal integrity, maturity, and holiness; regular participation in the Church’s sacramental life; evidence of recognized, ongoing commitment to the Church’s life and service; participation in faith enrichment opportunities (e.g., retreats, days of recollection, adult education programming); a positive and stable marriage, if married, or a mature celibate state of life, if single; active membership in a Christian community; capacity for obedience and fraternal communion; and a deep spirituality and prayer life. The presence of these qualities, experienced in kindness and humility, may demonstrate a call to the Order of Deacons.

Additional considerations that need to be stressed are the element of readiness and the timeliness of one’s response to a vocation. Since inquirers to the diaconate have many commitments to family, career, employment, community, and church service, it is a matter of prudential judgment to explore not only whether the call to the diaconate is from the Holy Spirit, but also whether the inquirer is ready and able to respond to that call at the present time. (From the National Directory for Formation, Ministry and Life of Permanent Deacons in the United States, Paragraphs 166-168.)

**Discernment:** The first step in discernment is in the heart of the individual and the stirrings of the Holy Spirit. When a call is felt, it must be tested within the context of the personal faith journey, the family (especially for those who are married), and the parish community. Discussion with the pastor or associate pastor, with deacons and other staff members is essential.

**Personal discernment:** The first stirrings of a vocation are often explored at a personal level and usually begin with seeking information about the diaconate. Reflection on the nature of a perceived call must include a spiritual dimension. The pastor and others on the parish staff are particular resources at this time.

**Family discernment:** Since the majority of those who inquire about a vocation to the diaconate are married, it is logical that discussions with their spouse would take place early in the inquiry stage. Children, parents, siblings and extended family should not be ignored in this process. The support of a wife is required for married men. Therefore, support and consent must arise from an informed understanding.

Communal discernment: Discernment for a diaconal vocation is not just a personal or family journey – it involves the entire church community. Indeed, a vocation is normally validated by a local parish community as that is the context in which most vocations develop. It is the responsibility of the community, especially the pastor, to invite from among its members those who may be qualified to serve as ordained ministers of the Church. Similarly, those church and community agencies that have often carried out the Church's mission of charity and justice have a unique opportunity to call forth appropriate nominees from among their personnel.

An inquiry about the diaconate and the formation process eventually includes the diocesan Church. Information sessions, the exploration of the criteria for a diaconal vocation, and particular counsel presented by the diaconate office can aid an individual in his decision to move forward to a formal application.

Readiness: Since inquirers to the diaconate have many commitments to family, career, employment, community, and church service, it is a matter of prudential judgment to explore not only whether the call to the diaconate is from the Holy Spirit, but also whether the inquirer is ready and able to respond to that call at the present time.

**Levels of Admission:** It is important to understand that admission to diaconal formation involves two hierarchical levels:

**Inquirer:** Is an individual who has met with, written to, telephoned, or otherwise communicated with an official of the Office of the Diaconate indicating a serious interest in exploring admission to the diaconate; and/or an individual nominated by his pastor. Individuals are verbally quick screened for such eligibility factors as age, marital status, residence, and ministry experience. If appropriate, the individual is provided with an information packet and put on the mailing list. The Office of the Diaconate maintains a record of the inquiry or nomination for 180 days. The general criteria for admission are described in the next section. In the six-month period prior to the formation of a new cohort, inquirers who have received a recommendation from their pastor will be interviewed (with their family) and receive assistance in completing the application. Formation meetings begin in the fall (of odd years). All inquirers are invited to participate in these meetings.

The inquirer who seeks consideration for ordination to the diaconate needs to enter into dialogue with his parish community. It is the pastor who initially presents him for consideration into diaconal formation through a letter that confirms he is a practicing Catholic of good repute and in good standing.

Inquirers are encouraged to begin, if they have not already done so, formation through one of the Lay Ministry Formation Programs of the Archdiocese such as Caminos de Fe in the Northwest Deanery, Emmaus Journey in the Albuquerque and Southwest Deaneries, and Discipulos Misioneros for the Spanish Speaking community.

**Inquirer-Applicant:** Is an individual who has completed and filed the forms for admission to the diaconate and has been notified in writing that the admission packet has been received.

Applications are generally accepted only during the months of November through March, every odd year, unless a special arrangement has been made with the Diaconate Office. If an application is received after the March 31 deadline, it cannot be considered for that cohort. Applications are screened, and the admission's packet audited by the staff in the order in which they are received. The notification of acceptance as an official applicant comes from the Deacon Formation Office. Inquirer- Applicants must participate in mandatory formation events and join a "Mentor Group." Inquiry status is normally a six month to one year period but may be extended indefinitely.

**Aspirant.** Admission as an aspirant means that the petitioner has been admitted to the propaedeutic period (preparation for study or instruction) which ordinarily covers 2 years. It is marked by participation in the formation meetings, on-line courses, practicums (personal prayer and outreach and justice), a "mentor group," and completion of a battery of tests and interviews.

**Candidate.** Admission as a candidate means that the petitioner has been invited by the Ordinary to enter formal preparation for ordination that ordinarily covers 3 years.

## 2. General Criteria for Deacon Applicants

*"...deacons must be respectable men whose word can be trusted, moderate in the amount of wine they drink and with no squalid greed for money. They must be conscientious believers in the mystery of faith. They are to be examined first, and only admitted to serve as deacons if there is nothing against them..."* 1 Tim. 3:8-12

The applicant for the Diaconate in the Archdiocese of Santa Fe should be a man who:

- Is committed to and lives out Gospel values of justice, charity and service.
- Has shown leadership qualities in parish/diocesan ministry for the past five years.
- Has a prayerful disposition.
- If married, is in a stable and happy marriage (5 years minimum) and whose wife and children support him in pursuing the diaconate. The marriage must be sacramentally valid.
- If not married, is willing to commit to celibacy.
- Situations of divorce/annulment will require special approval, in general, no more than one divorce/annulment and no children from the first marriage.
- If a convert to the faith, baptism or profession made over 5 years prior to application.
- Is living within the geographical boundaries of the Archdiocese of Santa Fe as a permanent resident of the United States.
- Is capable of college level work in theological studies and is open to spiritual and ministerial formation. (Has at least a high school diploma (no GED)).
- Can successfully pass a thorough criminal (no felony convictions or pending charges) and financial background check (no bankruptcies).
- Is no younger than 30 and no older than 55 years to enter the process (must be at least 35 and no older than 60 at ordination)
- Is capable of giving serious attention and time to theological study, spiritual formation and ministry.
- Has a stable work history (2 years).
- Has a positive attitude towards the Church and is flexible in adapting to the future needs of the Church.
- Is formally presented for the diaconate by his pastor who will see that he is mentored during the 5 years of formation.
- Must be physically and psychologically healthy.

- Should demonstrate grateful fidelity to all that the Church teaches.

Academically, candidates are expected to complete, successfully, the college level courses offered through the Deacon Formation program or equivalent program approved by the Director of Formation. Successful completion of a course means receiving a grade of C or higher. This standard applies to all courses.

Those men whose first language is not English may have to take the TOEFL (Test of English as a Foreign Language) and receive a score that represents an acceptable fluency in English.

Ministerially, it is expected that candidates have been actively involved in the Church's apostolate in their parish or Catholic agency for at least five years. This may include programs of social ministry, educational ministry, liturgical ministry, parish council, and so forth. Ministry in the area of social ministry has been the specific realm of the diaconate since its birth in the Apostolic Church (Acts 6:1-6). These ministries include serving the poor, the hungry, the sick, the homeless, the handicapped, the elderly, the imprisoned, life issues, and so forth.

### **3. Impediments to Holy Orders (Canon Law)**

Canon (Church) Law prohibits men from holy orders under certain circumstances. The two most common of which are:

- Committed murder or abetted in this crime (including abortion)
- Left the Church as an adult and joined a non-Catholic Church

The remedy for these is reserved to the Holy See. Permission must be granted prior to application.

## 4. Steps to Ordination

**Inquirer:** Is an individual who has been recommended for formation by his pastor and is in the process of making application. The required materials and review processes required for inquiry:  
Reception of a letter of endorsement from his pastor; and completion of a basic information form.  
The inquirer may be invited to complete a formation application.  
The length of the inquiry period is not determined and is not considered to be a formal part of diaconal formation.

**Aspirant:** Is an individual who has been formally accepted as a deacon aspirant by the Ordinary and is formally enrolled in the propaedeutic period:

- Application has been audited and found complete.
- Staff Screening for disqualifiers and impediments.
- Letter of petition from the individual to the archbishop has been received.
- Letter of approval from his wife has been received if he is married.
- Letters of recommendation have been received.
- Transcripts from high school and college have been received
- Participation in required formation meetings.
- Completion of Virtus training with a current certificate
- Involvement in a Mentor Group.
- An interview of the couple with either the Director of Formation, or with the Director, or delegate, has been completed.
- Testing and Examinations completed including but not necessarily limited to the following:
  - Medical Examination
  - Educational Examinations as appropriate.
- Employer recommendation and check of previous employment
- Criminal and Financial background check.
- The Director of Formation presents and overview of each applicant to the Committee on Admissions and Scrutinies. This body makes a recommendation to the Director of the Office of the Diaconate regarding the disposition of each applicant.
- The Director of the Office of the Diaconate reviews the recommendation and the application to determine whether to forward it to the Ordinary.
- The Ordinary reviews the applicant's file and decides whether to invite the individual to enter the discernment process as an aspirant.

The Aspirancy stage of formation lasts approximately two years. Its primary focus is on the spiritual formation of the Aspirant and his wife, if married.

**Candidate:** Is an individual who has completed the aspirant process, and the evaluation process required for candidacy.

The individual has been subsequently invited by the Ordinary to be admitted to candidacy for the diaconate. Enrollment among the candidates for the diaconate does not constitute any right necessarily to receive diaconal ordination. The formation process is a combination of completing the coursework through the Formation for Christian Service Program and completing formation requirements scheduled by the Office of the Diaconate. The formation meetings and practica are designed to allow a formal discernment process to continue while the candidate is completing their respective formation programs.

The goal is to select men who measure well against a standard of excellence. This does not necessarily mean academic excellence, but it does mean that any man admitted to the formation process will display major ministerial gifts and potentialities for excellence which are inherently diaconal. In other words, 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 Archdiocese to build and become the Body of Christ. In some fashion, each applicant is to exhibit characteristics in his way of ordinary life that points to extraordinary capacity in diaconal ministry.

The Committee on Admissions and Scrutinies interviews all aspirants in person. The committee shall have the entire application file available to them prior to the review of the aspirant who has petitioned to be admitted to candidacy for formation. The members receive an executive summary of the aspirant profile in advance of the interview.

Aspirants applying for admission to candidacy for formation should be actively and visibly committed to ministry in the parish/diocese and must be well known to the pastor or supervisor.

### **Documentation Required for Candidacy**

In order to advance to the candidate phase from the aspirant phase, the petitioner must have completed or be in the final stages of completing the following steps:

- Propaedeutic period of discernment is completed and certificate is filed.
- Interview with Director of Formation (wife and children are included if married with children.)
- Spouse interview by the Director or his delegate.
- Endorsement by pastor for Candidacy in writing. This typically also includes an interview with the Director of Formation and the pastor.
- Endorsement by the Mentor.
- Recommendations from parishioners (parish council, ministry team, etc.)
- An evaluative interview of the couple by a Deacon Couple appointed by the Committee on Admissions and Scrutinies.
- Psychological Examination.
- *Prepare/Enrich* or other measure(s) of marriage stability and spirituality.
- An affirmative staff review chaired by the Director for Formation.
- Language proficiency and academic assessment.
- Recording of proclamation skills.

### **Process for Advancement to Ordination**

The staff of the Office of the Diaconate conducts an audit of the petitioner's file to determine that all necessary documents are present, that all the mandatory evaluations have been completed, and that each required program phase has been passed. The following outline is an overview of the final steps in the process.

1. Case Summary, giving a profile of the petitioner, is prepared by the Director of Formation.
2. A recommendation is forwarded to the Committee on Admissions and Scrutinies and for the Vicar of Clergy.
3. Director of Formation or their delegate conducts a candidacy interview.
4. Candidate (and spouse) is interviewed by the Archbishop.
5. Formation Director's recommendation is prepared for the Archbishop.
6. Archbishop Case Review. The Vicar for Clergy and the Director of Formation meet with the Archbishop and present each man's portfolio with board and staff recommendations.
7. The Archbishop makes his decision on promotion to ordination.
8. The Archbishop notifies the petitioner of his decision in writing.

### **Installation to the Ministry of Reader**

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

- Completion of the first year of theological studies and formation (grade of "c" or better, no incomplete grades, etc.)
- Completion of the Practicum on Ministry of the Word.
- Letter presented to the Archbishop by the Candidate requesting installation as a reader.
- Spouse affirmation of support for their husband and consent of installation to the Archbishop.
- Evaluation and endorsement by the candidate's Pastor and Mentor.
- Positive recommendation by the Committee on Admission and Scrutinies.
- Call to Reader by the Archbishop.

Installation of Reader normally takes place at the Cathedral or another suitable Church in the fall.

### **Installation to the Ministry of Acolyte**

After completing two years of Candidacy, candidates normally apply to be installed into the Ministry of Acolyte. Installed Acolytes have special duties as ministers of the Altar. The process for acceptance into this ministry is as follows:

- Completion of the second year of theological studies and formation (grade of "c" or better, no incomplete grades, etc.)

- Completion of the Practicum on Ministry of the Altar.
- Letter presented to the Archbishop by the Candidate requesting installation as an Acolyte.
- Spouse affirmation of support for their husband and consent of installation to the Archbishop.
- Evaluation and endorsement by the candidate's Pastor and Mentor.
- Positive recommendation by the Committee on Admission and Scrutinies.
- Call to Acolyte by the Archbishop.

Installation of Acolyte normally takes place at the Cathedral or another suitable Church in the fall.

### **Advancement to Ordinand and Diaconate Ordination**

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

- Completion of theological studies and formation (grade of "c" or better, no incomplete grades etc.)
- Six Month Internship in assigned parish.
- Installation as Reader.
- Installation as Acolyte.
- Final file audit demonstrates candidate's portfolio (complete and free of disqualifiers.)
- Ordinand's interview with his pastor.
- Pastor's endorsement of Ordination.
- Comprehensive Examination passed.
- First year *ad experimentum* assignment finalized and preliminary letter mailed to pastor and to ordinand.
- Ordinand's Retreat.
- Letter of Petition to the Archbishop.
- Certificate to the Archbishop (Qualities for Reception of the Order of Deacon from the Director.)
- Interview with Archbishop. (Wife to be included.)
- Placement interview with the Director of the Diaconate Office. (Wife to be included.)
- Certificate of readiness provided by the Director of Formation.
- Consent of Wife if married (handwritten and signed.)
- Profession of Faith and Oath of Fidelity.
- Faculties and assignment letter mailed from the Archbishop.

**Request by Candidate:** At the conclusion of the formation journey, the candidate who, in agreement with the Director, considers himself to have the necessary prerequisites for ordination, may address to the Archbishop:

- A declaration written in his own hand and signed by him, in which he attests that he is about to receive the sacred order freely and of his own accord.
- He will devote himself permanently to the ecclesiastical ministry.
- Asking at the same time that he be admitted to receive the order.

**Audit:** Prior to ordination, the Director of Formation 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.
- The hand-written consent of his wife if the ordinand is married.

**Certificate of Readiness:** Having received the request of the ordinand, the Archbishop will evaluate his suitability by means of a diligent scrutiny. He will examine the certificate that the Director of Formation is obliged to present to him concerning the qualities required in the candidate for the reception of the order, namely:

- Sound doctrine.
- Genuine piety.
- Good moral behavior.
- Fitness for the exercise of ministry.
- After proper investigation, a certificate of physical and psychological health.

## **II. Language Formation**

### **Policy Statement:**

The goal of deacon formation is to ensure that the Spanish speaking community in the Archdiocese of Santa Fe has an adequate presence of ordained ministers who can sanctify, teach and preach in the context of Spanish language liturgies, etc.

At the same time, each person who aspires to the Permanent Diaconate and does not speak English as a first language, is called to develop their skills so that they can not only take courses in English, but can sanctify, teach and preach in the context of English liturgies, etc.

### **General Guidelines:**

Deacon aspirants will be tested in their language skills based on their primary language. If they are English speakers, they will be tested in their Spanish skills. If they are primarily Spanish Speakers, they will be tested in their English skills.

The first test will result in a recommended plan for language formation tailored to the individual. The candidate will be tested periodically throughout formation with milestones established. Ultimately, the newly ordained deacon will be expected to converse in Spanish at a college level (for English speakers). Spanish speakers are expected to handle a course of study in English before they are accepted into Aspirancy. They are also expected to be able to preach and teach in English within one year of post-ordination.

### **Time-line:**

Aspirancy- Appropriate Language Test is given in “PDF 208 Foreign Language Skills,” Aspirants will be given some options as where to or what to use to develop language skills. For example a college course, videos, tapes, or books. A customized plan for language skill development will be produced for each Aspirant.

Candidacy I – In “PDF 309 Proclamation of the Word” course: Candidates are expected to be able to proclaim the Gospel in their secondary language with no preparation.

Candidacy III - In “PDF 507 Homiletics Practicum,” Candidates are expected to clearly read a homily in their secondary language.

Post-Ordination Formation I, II, and III - Each year the Ordinand will be tested to see how conversational skills are improving in order to meet the ultimate goals stated above. Once the goal has been met, the Ordinand testing will cease. If the Ordinand achieves the goal prior to ordination, they will be retested at least once in post- ordination to ensure they are maintaining the language skills.

3/20/2007

### III. Deacon Formation Mentors

#### *Mentors*

280. The Director of Formation, with the approval and appointment of the Archbishop, should designate mentors from among deacons or priests who are knowledgeable and competent to assist him in assessing the potential and qualifications of those in formation. The mentor is equivalent to the “tutor” described in the Basic Norms for the Formation of Permanent Deacons. The mentor is charged with following the formation of those committed to his care, offering support and encouragement. Depending upon the size of the formation community, a mentor will be responsible for one aspirant or candidate, or he may be invited to minister to a small group of aspirant or candidates. Mentors receive their orientation and supervision from the Director of Formation. They also help the Director for Pastoral Formation facilitate theological reflection among those assigned to them. Mentors are members of the formation team and are invited “to collaborate with the director of formation in the programming of the different formational activities and in the preparation of the judgment of suitability.” (National Directory for the Formation, Ministry, and Life of Permanent Deacons in the United States)

#### What is a Mentor Couple?

- Experienced deacon (min 3 years ordained) and his wife selected by the Director of Formation with the approval of the bishop to:
  - Form caring supportive relationships with deacon aspirant, candidates, and their wives in order to help them develop and succeed through their formation experience.
  - Assist the Director of Formation in evaluation of the aspirant, candidate and wives in their charge.
- Qualities of the couple:
  - Ability to guide, tutor, actively listen and coach
  - Model of Diaconal Spiritualities and Ministry
  - Accountable to the Director of Formation

#### Functions of the Mentor Couple:

- Facilitates interaction at monthly discernment meetings
- Maintain confidentiality
- Participates in annual orientation and training events sponsored by the Diaconate Office
- Submit annual reports to the Director of formation on each aspirant/candidates
- Report any problems, concerns, changes in address, etc as they arise to the Director of Formation

## IV. Mentor Groups

Beginning with the Inquiry phase of formation, participants and their wives are expected to form a small faith community with others in formation. This “Mentor Group” will provide a great deal of the “spiritual” formation of the deacon, give them an opportunity to discern their role in formation and within the diaconal community, and to receive mentoring from an experienced deacon couple.

Mentor Groups generally meet on a monthly basis at the home of one of the participants. The format may vary (an optional format is detailed below). A deacon and his wife serve as mentors to the circle.

Deacon Mentors: (See policy III. Deacon Formation Mentors)

Each Mentor Group must maintain a registry with the Diaconate Office. Participants who wish to make changes in their group or who wish to transfer to another group, may do so only with the approval of the Director of Formation, and all involved mentors.

Each aspirant and candidate must, on an annual basis, report to the Director of Formation on their involvement in the Mentor Group. It is important that any problems or issues that surface as a result of this involvement be reported in a timely manner as well.

Here is a sample agenda for a circle, but it can vary depending on the situation:

1. **Greeting**
2. **Liturgy of the Hours** (*A different leader each month*)
3. **Scripture: Proclamation and Reflection** – *A leader is assigned for each month*
4. **God Moments:** (*Each person gives a 1 or 2 minute sharing on some way that God has touched them over the last month. The deacon couple leads the God Moment reflections*)
5. **Intercessions:** *A different person leads the prayers of the faithful each month. Intentions are invited from the group as well.*
6. **Monthly Program** (*A different couple is responsible for the program each month. The Deacon Couple, one member or a couple might make a presentation on a topic related to discernment, or there might be a video, a shared book or article, or a guest speaker such as a priest, deacon, SVDP president, etc. Some groups occasionally make fieldtrips and conduct the group meeting at that site.*)
7. **Fellowship** (*The host couple generally provides a light refreshment. Some groups gather around a meal.*)
8. **Circle Sharing** (*This is facilitated by the deacon couple. The group gathers in a circle for sharing. Sometimes everyone shares, at other times only one or a few share. This is an intimate time of giving of one's self to others in a shared story telling of the discernment journey.*)
9. **Setting the Next Mentor Group Meeting**
10. **Closing Prayer and Blessing**

The group may want to hold occasional socials or other programs for the entire family.

## V. Theological Formation

There are several options for the theological formation of deacon Aspirants and Candidates. Most inquires, Aspirants and Candidates will take part in on-line theological studies with the University of Dayton's Virtual Learning Community for Faith Formation (VLCFF). These five week courses form the foundation for theological studies which will be supplemented by monthly formation meetings. Some students may enroll in graduate theological studies. Programs must be approved by the Director of Formation.

Candidates for the Permanent Diaconate must complete the course of studies with a grade of "C" or better. Faculty will be consulted regarding the academic performance of the candidate.

Graduates of the Emmaus Journey Program, Caminos de Fe, Jornada de Fe or Discipulos Misioneros programs may have their on-line course work reduced. This will be worked out individually with the Director of Deacon Formation.

1. To enroll in classes with the VLCFF, log onto the website (<https://vlcff.udayton.edu/>) and enroll as a student. The home page contains instructional videos for how to enroll. Make sure and select the Archdiocese of Santa Fe as your sponsoring diocese. This will reduce the amount of tuition that is paid.
2. St. Norbert College has a campus at Santa Maria de la Vid Abbey in Albuquerque. Completion of this degree partially satisfies the requirements for diaconal formation. They offer a Master's Degree in Theological Studies. Funds may be available to assist in paying for classes in this program.
  - a. Contact Dr. Christina Spahn: (505) 873-4399, ext 229; [christina.spahn@snc.edu](mailto:christina.spahn@snc.edu)
3. Lewis University has a campus in Albuquerque. They offer a bachelor's degree in either psychology or organizational leadership with a minor in theology. Completion of either of these degrees partially satisfies the requirements for diaconal formation. Funds may be available to assist in paying for classes in this program.
  - a. Contact Joyce Montoya-Roach ([montoyje@lewisu.edu](mailto:montoyje@lewisu.edu))
4. Theological programs of study must be approved by the Director of Formation.

## **VI. Withdrawal from Formation**

It occurs now and then that an aspirant or candidate for the Permanent Diaconate withdraws from formation. The following policies apply to these situations:

**Inquirer:** When an inquirer leaves formation 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 Office of the Diaconate, the Director of Formation 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:** Upon receipt of written notice that an aspirant or candidate has withdrawn from formation, the Director of Formation will notify the Archbishop, the Director of the Diaconate Office, the Admission and Scrutinies Committee, and the Aspirant/Candidate's pastor and mentor. A meeting with the aspirant/candidate will be arranged and a report will be filed by the Director of Formation or his delegate. Follow-up activities may ensue at the discretion of the Formation Director, including phone or email communications, personal visits, etc.

**Involuntary Withdrawal:** Upon recommendation of involuntary withdrawal by the Admission and Scrutinies Committee, the Director of Formation will notify the Bishop and the candidate/aspirant's pastor and mentor. A meeting will be arranged between the pastor, the mentor, the candidate/aspirant (and his wife) and others who may be invited at the request of the staff or the candidate/aspirant, at which time they will be notified of the action and the reasons for taking it.

Follow-up activities may ensue at the discretion of the Director of Formation, 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 Director of Formation 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 and Scrutinies Committee. Upon completion of these steps, the Inquirer may 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 Admission and Scrutinies Committee recommends that a delay occur, the Director of Formation, upon written or verbal notice of such, will meet with the aspirant to aid in the discernment of status. The Archbishop, the Director of the Diaconate Office and the aspirant's pastor and mentor 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. The Admission and Scrutinies Committee will review the petition, interview the aspirant (and his wife) and advise the Director of the Diaconate Office 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 Director of Formation will meet with the aspirant, their pastor and mentor (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 Director of Formation will meet with the candidate, their pastor, and mentor (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. The candidate (and his wife) will meet with the Director of Formation to begin the process of reinstatement. The candidate (and his wife) will also meet with the Admission and Scrutinies Committee who will advise the Archbishop on the merits of the petition. The Archbishop will determine whether or not the candidate is ready for readmission. The burden of proof of readiness for ordination rests with the candidate.

If it is determined that the candidate is to be readmitted, the Director of Formation, with advice from the Admission and Scrutinies Committee, 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 Director of Formation will meet with him to determine an appropriate course of action.

## **VII. 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 Admission and Scrutinies Committee 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 Director of Formation in the previous diocese.

### **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 home.

## VIII. Spiritual Direction

Those in diaconal formation are required to enter into spiritual direction with a priest or other person who has been approved by the Archbishop to function in this formational role: *The role of the spiritual director, who must always be a priest\*, is critical to the formation process, particularly in assisting the participant to discern and affirm the signs of his vocation. An individual's spiritual director may be chosen directly by the participant with the approval of the bishop, or from a list of spiritual directors similarly approved. The distinction between internal and external forums must always be clearly maintained.* (ND, 117)

The Spiritual Director should not be a pastor or other person who serves in any supervisory capacity over the candidate.

Formational Spiritual Direction occurs during both Aspirancy and candidacy, each phase of formation having its own particular focus. As noted in the Directory, during Aspirancy, *the: [...] spiritual director is critical to the formation process. This priest, who is to be approved by the bishop, must be well trained and knowledgeable about the diaconate. The spiritual director accompanies, supports, and challenges the aspirant in his ongoing conversion. The spiritual director assists the aspirant in his relationship with God and his understanding that it is Christ who "calls," the Church that affirms his diaconal vocation, and the bishop who responds to that affirmation by the imposition of hands.* (ND, 194)

The Directory offers this guidance for spiritual direction during candidacy: *One of the primary objectives of the spiritual dimension of the candidate path in formation is "to assist the candidate in achieving a spiritual integration" of his life, family, work, and apostolic service [...] Throughout his formation, the candidate is "to secure the assistance of a [... priest spiritual director], to cultivate regular patterns of prayer and sacramental participation, and [...] to reflect spiritually on [his] ministry."* (ND, 216)

Aspirants and candidates are encouraged to meet monthly for the first year, then at least quarterly with their spiritual director throughout formation.

\*this requirement has been waived by Archbishop Wester

For assistance in selecting a spiritual director, contact Fr. Christopher Hallada, Director of Spiritual Formation: 505-238-6700 Email: [challada@archdiosf.org](mailto:challada@archdiosf.org)

## **IX. Formation Costs**

The cost of formation is shared by the Aspirant/Candidate (and spouse), the parish and the diocese. While there is no intention to impose an undue burden on the participants, it must be understood that those applying for diaconate formation must have some financial means at their disposal.

|                        |                         |               |
|------------------------|-------------------------|---------------|
| <b><u>Inquiry:</u></b> | <b>Application Fee:</b> | <b>\$ 150</b> |
|------------------------|-------------------------|---------------|

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|                          |                  |                |
|--------------------------|------------------|----------------|
| <b><u>Aspirancy:</u></b> | <b>Parish:</b>   | <b>\$1,100</b> |
|                          | <b>Aspirant:</b> | <b>\$ 400</b>  |

|                          |                   |                |
|--------------------------|-------------------|----------------|
| <b><u>Candidacy:</u></b> | <b>Parish:</b>    | <b>\$1,100</b> |
|                          | <b>Candidate:</b> | <b>\$ 400</b>  |

|                         |                                                                                                                      |
|-------------------------|----------------------------------------------------------------------------------------------------------------------|
| <b><u>Practica:</u></b> | The inquirer/aspirant/candidate is responsible for all costs associated with the completion of the various practica. |
|-------------------------|----------------------------------------------------------------------------------------------------------------------|

Note that these fees cover the entire cost of formation, including tuition, books, and hospitality. Travel and lodging is the responsibility of the inquirer/aspirant/candidate.

**The above fees are subject to change.**

## **X. Complaints against Deacon Inquirers, Aspirants, and Candidates**

### **1 Guidelines**

Complaints against those in formation may surface occasionally. The following guidelines will be used for complaint management and are based on fundamental values and principles including these:

- a Respect for the human person and everyone's right to a good name and reputation.
- b The common good of the Holy Catholic Church and her faithful.
- c The right of the inquirer/aspirant/candidate to receive objective information, particularly regarding personnel policies and procedure of the Church as they affect him.
- d The well-founded possibility of facilitating reconciliation.
- e The right to due process.

### **2 Conflict Management**

- a Every non-anonymous complaint against a man in formation will be investigated. The procedure will be dependent on the situation.
- b Complaints are accepted, ordinarily, only if the complaints were taken to the person(s) involved without success and there is no other intermediary.
- c The manner in which the complaints are handled must convey to the Inquirer/Aspirant/Candidate that no judgment is made concerning the validity of the complaints until his side is heard.

### **3 Allegations of Sexual Misconduct with a Minor**

This Policy does not address allegations of sexual misconduct with a minor. Such matters are subject to an entirely separate process under the Roman Catholic Archdiocese of Santa Fe Policy on Sexual Misconduct by Archdiocesan Personnel. Such matters are to be immediately reported to the appropriate law enforcement agency with notification to the Youth Protection Advocate of the Archdiocese of Santa Fe.

### **4 Allegations of Inappropriate and Unprofessional Behavior**

Allegations of criminal sexual misconduct are reported to the appropriate law enforcement agency. Inappropriate, but non-criminal sexual behavior or other unprofessional behavior is reported to the Director of Formation.

- a Inquirers or Aspirants who receive a credible accusation of inappropriate behavior are subject to removal from diaconal formation.
- b Candidates who receive a credible accusation will be required to take a leave of absence until such a time that the accusation is dismissed. In the event that an accusation is proven to have

merit, a review will be conducted by the Admission and Scrutinies committee and a recommendation will be made to the Archbishop.

## **XI. Abuse Awareness Training (Virtus)**

Prior to acceptance as a Deacon Aspirant, Inquirers will be asked to complete the Archdiocesan Call to Protect Training (Virtus). They are also expected to update their training every five years as required by the Archbishop.

## **XII. Wives and Children of Inquirers, Aspirants and Candidates**

A family life perspective is rooted in the challenge of Pope John Paul II as stated in Familiaris Consortio: “No plan for organized pastoral work at any level must ever fail to take into consideration the pastoral area of the family.”

Each participant must explore ways to keep his family life a priority in the face of growing demands of formation and ministry, which include issues of age, faith, health, economics, employment, and relationships.

In deciding to pursue a possible diaconal vocation, a married man must comply with the wishes of his wife, in a spirit of mutual commitment and love. A wife is an equal partner in the Sacrament of Matrimony and is an individual person with her own gifts, talents and call from God. A candidate’s diaconal formation can be a unique and challenging situation and opportunity for his wife. She should be involved in the program in appropriate ways. The Church has determined that a married man cannot be considered for the diaconate without the consent of his wife. After ordination, a deacon’s wife needs to “be duly informed of her husband’s activities in order to arrive at a harmonious balance between family, professional and ecclesial responsibilities.” (Directory on the Ministry and Life of Permanent Deacons, no. 61)

Spouses are welcome to attend all facets of formation and the Director of Formation will ensure their inclusion. The Director of Formation will also clearly indicate to those in formation what elements of the formation process require the participation of the wives.

Wives of those in formation will be provided opportunities for spiritual growth throughout the formation process and will be consulted to ascertain their questions and concerns.

Children of the participants will also be included in appropriate ways. Younger children and teens are especially encouraged to express their concerns about the public role of this ministry and how it affects their lives both within the family and among their peers.

### XIII. Contact Information

Office of the Diaconate  
Archdiocese of Santa Fe  
4000 St. Joseph Place NW  
Albuquerque, NM 87120  
<http://santafedeacons.net/index.htm>

Dcn. Keith Davis  
Director for Formation/Director  
of the Office of Deacons

505-831-8259(office) 602-799-9597(cell)  
Email: [dcnformation@archdiosf.org](mailto:dcnformation@archdiosf.org)  
Email2: [kdavis@archdiosf.org](mailto:kdavis@archdiosf.org)

Yolanda Lovato  
Administrative Assistant

505-831-8246  
[ylovato@archdiosf.org](mailto:ylovato@archdiosf.org)

(vacant)  
Assistant Director for Formation

Fr. Chris Hallada  
Assistant Director for Spiritual Formation

505-345-4596; 505-238-6700  
Email: [challada@archdiosf.org](mailto:challada@archdiosf.org)

Dcn. Tony Rivera  
Assistant Director for Supervised Field Education

505-410-9707 (cell)  
[deacontony@q.com](mailto:deacontony@q.com)

Dcn. Michael and Kathy Wesley  
Assistant Director for Assessments  
Deacon Mentor Couple

505-341-2219 (home)  
505-249-2747 (cell)  
Email: [diakonia@live.com](mailto:diakonia@live.com)

Dcn. Doug Feery  
Assistant Director for Mentor Groups

505-604-6582 (cell)  
[dopayfee@gmail.com](mailto:dopayfee@gmail.com)

Dcn. Dan and Jan Kennedy  
Deacon Mentor Couple

505-588-2161(home)  
Email: [danokennedy@gmail.com](mailto:danokennedy@gmail.com)

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Deacon Mentor Couple

505-471-0554 (home)  
Email: [deaconbillk97@gmail.com](mailto:deaconbillk97@gmail.com)

Dcn. Juan and Senaida Ortiz  
Deacon Mentor Couple

505-433-4563 (home)  
Email: [Seijim\\_jo@hotmail.com](mailto:Seijim_jo@hotmail.com)

Dcn. David and Ann Little  
Deacon Mentor Couple

505-890-6574 (home)  
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Dcn. John and Pamela Sutton  
Deacon Mentor Couple

505-672-1607 (home)  
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Dcn. Chris and Dolores Gilbert  
Deacon Mentor Couple

505-753-2565 (home)  
Email: [chrisgilbert53@gmail.com](mailto:chrisgilbert53@gmail.com)

Dcn. Eloy and Anita Roybal  
Deacon Mentor Couple

575-387-2686 (home)  
[deaconeloy@gmail.com](mailto:deaconeloy@gmail.com)

|                                                           |                                                                                                |
|-----------------------------------------------------------|------------------------------------------------------------------------------------------------|
| Dcn. Jerry and Florence Quintana<br>Deacon Mentor Couple  | 575-758-7312 (home)<br>Email: <a href="mailto:jlqjerry@live.com">jlqjerry@live.com</a>         |
| Dcn. Juan and Irene Rodriguez<br>Deacon Mentor Couple     | 575-693-6659 (cell)<br>Email: <a href="mailto:deaconjarod@yahoo.com">deaconjarod@yahoo.com</a> |
| Dcn. Michael and Jennifer Salazar<br>Deacon Mentor Couple | 505-473-3532 (home)<br>Email: <a href="mailto:mshelly0415@aol.com">mshelly0415@aol.com</a>     |
| Dcn. Anthony and Mardell Trujillo<br>Deacon Mentor Couple | 505-982-0618 (home)<br>Email: <a href="mailto:deaconat1@aol.com">deaconat1@aol.com</a>         |
| Larry Carmony<br>Deacon Mentor                            | 505-259-4087                                                                                   |
| Tony & Kathy Rivera<br>Deacon Mentor Couple               | 505-410-9707<br><a href="mailto:deacontony@q.com">deacontony@q.com</a>                         |
| Deacon Ricardo Chavez<br>Deacon Mentor                    | (505) 220-5070<br><a href="mailto:chavez567@msn.com">chavez567@msn.com</a>                     |
| Lou and Deana Hernandez<br>Deacon Mentor Couple           | 505.228.0246<br><a href="mailto:DeaconLou@stcbabq.org">DeaconLou@stcbabq.org</a>               |

## Mentor Group Log

Office of the Diaconate  
Archdiocese of Santa Fe  
4000 St. Joseph Place NW  
Albuquerque, NM 87120

Name: \_\_\_\_\_

**Directions:** This log is to be maintained throughout the year. It must be submitted by mail to the Diaconate Office twice per year, namely, on or before February 1<sup>st</sup> and May 1<sup>st</sup>.

| Date | Start/End Time | Location | Reflection |
|------|----------------|----------|------------|
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Mentor

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Date

July 17, 2023