



CATHOLIC DIOCESE
OF LEXINGTON

Roman Catholic Diocese of Lexington, KY

Handbook for the Permanent Diaconate

July 2021

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SECTION 100 – ADMINISTRATION

101- Director for the Permanent Diaconate

- A. The Director for the Permanent Diaconate is appointed by Diocesan Bishop and serves as his representative in all matters related to the Permanent Diaconate.
- B. The Director for the Permanent Diaconate is responsible for all activities and programs assigned to the Office for the Permanent Diaconate; for the functions defined in the *National Directory for the Formation, Ministry, and Life of Permanent Deacons in the United States* (see n271 and n286); for the functions defined in this handbook; and for any additional responsibilities deemed appropriate by the Bishop.
- C. The Bishop may assign additional staff to the Office for the Permanent Diaconate as needed.

102 – Director for Deacon Formation

- A. The Director for Deacon Formation for a specific formation class is appointed by the Bishop.
- B. An Associate Director for Deacon Formation may be appointed by the Bishop upon the recommendation of the director.
- C. Once established, the director and his formation team...
 - 1. advertises to recruit candidates for the new class,
 - 2. receives and pursues nominations from the pastors,
 - 3. conducts informational meetings, and
 - 4. processes candidate applications.
- D. The director and his team develop and implement the aspirancy year and the four years of the deacon formation program.

SECTION 200 – ORGANIZATION

201 – Deacon Assembly

The Deacon Assembly is made up of all deacons in the diocese and their spouses, if married. Included in this group are incardinated deacons, those not incardinated but serving in the diocese, retired deacons and spouses, and spouses of deceased deacons. The Deacon Assembly will meet at least two (2) times per year in addition to the annual retreat.

202 – Deacon Council

A. Purpose

1. Develop, recommend, and implement programs that will foster the growth and welfare of the deacon community.
2. Provide opportunities for ongoing spiritual, educational, and ministerial formation.
3. Promote and maintain contact among members of the deacon community.
4. Establish functional committees as needed.
5. Recommend programs, policies, and procedures to the Bishop related to matters of concern for the deacon community.

B. Membership

1. The Director for the Permanent Diaconate will chair the Deacon Council.
2. In addition to the director, the council will consist of five (5) elected deacons/deacon couples from the Deacon Assembly. Spouses of deacons are invited to serve as council members, but they are not required to do so. The term for elected members is three (3) years.
3. Nominations will be solicited from the entire assembly membership.
4. Vacancies on the council may be filled by a special election or the council may defer to the next scheduled election.

C. Decision-making

1. Council decisions require the consensus of the members and/or the Bishop's approval.
2. If a consensus cannot be reached, the decision should be deferred until such time as additional discussion and debate can take place to reach consensus. If the council is unable to reach a consensus in the time allowed for a decision, the director will consult with the Bishop.

D. Meeting Frequency

The council will meet as needed. An annual organization meeting will be the first meeting. It is to take place no later than thirty (30) days after a regularly scheduled election. At this meeting, the newly elected members will assume their positions, elect a secretary, assign members to standing committees, and set the dates for Deacon Assembly meetings and the annual retreat.

E. Standing Committees

1. Committee members are to be recruited from the Deacon Assembly.
2. Committee members may also be recruited from outside the Deacon Assembly should the subject matter expertise required by a committee not be found within the assembly.
3. Each committee will select its own chair.
4. A member of the Deacon Council will be assigned to act as a liaison to each committee.
5. The following standing committees are to be permanently established:
 - a) Formation/Education Committee
 - Provides the annual retreat.
 - Provides ongoing educational opportunities.
 - Identifies continuing formation resources and/or opportunities, including conferences.
 - Identifies video/audio tapes, books, retreats, and workshops and furnishes these to the Communication Committee for distribution to the deacon community.
 - Performs other duties as assigned by the Deacon Council or the Director for the Permanent Diaconate.
 - b) Communication Committee
 - Coordinates the telephone committee, including the prayer line.
 - Disseminates information provided by the Deacon Council or other committees.
 - Coordinates with other communication vehicles in the diocese.
 - Performs other duties as assigned by the council or director.

203 – Area Meetings

- A. Areas are defined as logical/geographical groups of deacons and their families and my cross diocesan deanery boundaries as appropriate.
- B. Area Meetings are the responsibility of the particular area members.
- C. These meetings should be scheduled at least two (2) times per year for the purpose of prayer, discussion, sharing, and help in personal development and ministry.
- D. Area groups may consist of deacons only, deacon spouses only, deacons and spouses together, and/or deacon families depending on the goals of a particular area group.

204 – Personnel Board

The Bishop of the Diocese of Lexington has established a Deacon Personnel Board to assist him in assigning and evaluating deacons, as well as, in other matters of import.

A. Role

1. The Personnel Board is advisory only. All personnel decisions regarding deacons rest solely with the Bishop.
2. The Personnel Board is to observe strict confidentiality on all matters.
3. The Personnel Board is to consider the needs of the diocese, the particular place of assignment, and the capabilities of the deacon to meet the needs of a particular parish when making a recommendation to the Bishop.

B. Membership

1. The Personnel Board consists of five (5) deacons: one (1) appointed by the Bishop; one (1) appointed by the Director for the Permanent Diaconate; and three (3) elected by the deacon community.
2. The Director for the Permanent Diaconate and one (1) priest, appointed by the Bishop, are *ex officio* non-voting members of the Personnel Board. It is recommended that the priest assigned also be a member of the Priest Personnel Board.
3. The members shall choose a chair to serve a one (1) year term each year after newly elected members are installed (see Election Timeline below).

C. Elections

1. The three (3) elected deacons represent different ordination classes. The ballot, therefore, limits each member to one vote for a candidate from their own ordination class.

2. Election Timeline:

a) **November 1** – Director for the Permanent Diaconate issues an announcement requesting nominations for the Personnel Board.

b) **November 15** – Deadline for receipt of nominations. The director reviews nominations for proper qualifications and confirms candidates to be placed on the ballot.

c) **December 1** – The director emails ballots to all deacons in the diocese.

d) **December 15** – Deadline for receipt of cast ballots. Ballots must be returned to the director by **11:59 p.m.** on July 15, regardless of the day of the week. Ballots received after this date and time are not counted.

e) **December 22** – The director announces the election results.

f) **January 1** – Newly elected Personnel Board members are installed.

D. Terms

1. Each member, elected or appointed, serves a three (3) year term.

2. Terms expire on July 31. Terms for newly elected members begin on August 1.

3. A member may serve two (2) consecutive terms. After serving two (2) consecutive terms, the member may pursue a new three (3) year term after a one (1) year mandatory waiting period.

4. A member may be removed from the Personnel Board by the Bishop at any time “for cause.”

E. Process for the Assignment of Deacons

While the Bishop retains the right to make any and all deacon assignments without consulting the Personnel Board, it will normally be consulted on all deacon assignments and will be provided with background information necessary to make proper recommendations about assignments to the Bishop. In making recommendations to the Bishop, the Personnel Board...

1. Will consider the particular circumstances of the parishes involved, the diocese, and the deacon's ministerial expectations.
2. May seek the advice and input from the Bishop, as well as priests, deacons, and lay leaders in order to more fully understand and respond to the needs of the parish, the diocese, and the deacon.
3. May make requests from and send communications to the Director for the Permanent Diaconate for administrative support from the director and/or chancery staff.

F. Criteria for the Assignment of Deacons

1. Languages needed to effectively serve a parish;
2. Size of the parish, number of parishioners;
3. Sacramental statistics (pastoral care);
4. Additional institutions within the parish boundaries – school, hospital, nursing homes, prisons, etc.;
5. Availability of support staff; and
6. Age, years ordained, experience, personal needs, interests, expectations, desires, skills, availability of the deacon (employment status) under consideration.

SECTION 300 – MINISTRY

301 – Assignment of Deacons

A. Criteria for the Assignment of Deacons

1. The principal criteria for a diaconal assignment are the pastoral needs of the diocesan Church and the personal qualifications of the deacon (see the *National Director for the Formation, Ministry, and Life of Permanent Deacons in the United States* n.42).
2. Deacon assignments ought to provide ample opportunities for the integrated exercise of the threefold diaconal ministry: Word, liturgy, and charity.

B. Letter of Appointment

1. The Bishop appoints the deacon to a specific ministry by means of an official letter of appointment. This letter...
 - a) specifies the ministry or ministries to which the deacon is assigned;
 - b) provides a delineation of his duties and responsibilities; and
 - c) designates his pastor or priest supervisor (in cases of assignment to an office or agency not led by a priest).
2. A change in a deacon's assignment will be effected by the issuance of a new letter of appointment.

C. Appointment Procedures

1. Prior to the meeting of the Personnel Board, the Director for the Permanent Diaconate consults with the deacon or deacon candidate (if prior to ordination) to appraise the deacon's gifts, interests, and skills and to assess his openness to a given assignment.
2. The Personnel Board reviews and makes an assignment recommendation to the Bishop.

3. Following the acceptance of an assignment recommendation by the Bishop, the director, pastor or priest supervisor, and the deacon meet to determine specific responsibilities, any objectives, and the extent of the assignment location's responsibility for expenses incurred by the deacon in the execution of his assignment.

a) The agreement must be carefully documented as it forms the basis for the annual ministerial review process (see Appendix).

b) The agreement should explicitly identify the expectations to establish a clear line of mutual responsibility and accountability between the parties.

c) The agreement must explicitly recognize the deacon's responsibilities to his family, his employment, and his ministry as the deacon is expected to support his family and himself through employment outside the Church or through employment with the Church apart from his diaconal assignment.

d) The agreement should address the following items:

- Average time per week to be spent in ministry;
- Ministry of Word, liturgy, and charity;
- Reimbursement for agreed upon expenses;
- Reimbursement for annual retreat and continuing education expenses;
- Expectations of the community served by the deacon; and
- Supervision and accountability.

D. Conflict Resolution

The deacon and pastor or priest supervisor should always attempt to handle any conflicts arising from an assignment first. If they are unable to satisfactorily resolve said conflict, the deacon is to notify the Director for the Permanent Diaconate. The director then notifies the Bishop to determine an appropriate course of action to satisfactorily resolve the conflict.

302 – Faculties

A. Faculties in the Roman Catholic Diocese of Lexington are granted by the Bishop on an individual basis.

B. Each deacon receives a letter from the Bishop defining the faculties granted to him for ministry within the diocese.

C. In most cases, deacons are granted the faculties outlined in the Clergy Faculties Letter. A copy of this letter may be obtained from the Office of the Chancellor.

D. Upon ordination, deacons are generally given ordinary preaching faculties, i.e. they may preach at liturgical functions.

E. In the event the Director for the Permanent Diaconate determines these faculties should be postponed in the case of a particular deacon, the director informs the Bishop and recommends the exercise of the faculties to preach be granted at a time other than ordination. The deacon is to be informed about his preaching faculties prior to ordination.

303 – Transfer of Deacons

From time to time, it may be advisable or necessary to transfer a deacon from his assignment to another assignment. All assignments are from the Bishop alone. No deacon or pastor/priest supervisor can execute a transfer in assignments.

A. Directive of the Bishop

The Bishop may appoint a deacon to a specific assignment or request a deacon to consider a transfer to a new assignment. The Bishop takes into consideration a deacon's place of residence, family responsibilities and individual circumstances when making any assignment.

B. Request for transfer

A deacon may request a transfer in assignments. In such cases, the deacon consults with the Director for the Permanent Diaconate to discuss the feasibility of a proposed transfer and to initiate the transfer process.

The transfer process is as follows:

- The deacon will inform his pastor or supervisor of his desire to transfer.
- The director will notify the Bishop of the deacon's request.
- The Bishop will consider the request in light of diocesan needs, the reason for the request and the recommendation of the director.
- If the Bishop approves, the director will meet with the deacon and his new pastor/supervisor to ascertain the specifics of the new assignment.
- The chancellor will notify all parties involved of the effective date of the appointment via letter.

304 – Leave of Absence

The Bishop may grant a leave of absence. A leave of absence must be formally requested in writing, addressed to the Bishop and copied to the Director for the Permanent Diaconate.

A. During an approved leave of absence, the deacon is relieved of responsibility for any ecclesial office/function and for participation in diaconal ministry.

B. Leave may be granted for reasons of health, personal problems, family commitments, temporary transfers in occupation or temporary dislocation from the diocese.

C. Leave may be granted for a period of up to one (1) year.

D. The Bishop, Director and the deacon may review the leave of absence at any time.

E. Leave may be extended for one (1) year after consultation with the Director with the approval of the Bishop.

1. Failure to return to an ecclesial office/function or diaconal ministry upon the expiration of the initial leave of absence without an application for an extension will be interpreted as a resignation and separation from diocesan ministry. The deacon will be designated as inactive.

2. If after two (2) years of approved leave, the deacon is unable to resume his ecclesial office/function or diaconal ministry, he will be designated as inactive.

F. When a deacon knows that he will be absent continuously from the diocese for a period longer than one (1) month, he must inform the Director of the proposed length of his absence, his temporary mailing address and telephone number.

G. If a deacon plans to become involved in formal diaconal ministry in the diocese in which he temporarily takes up residence, he is expected to follow the procedure for application specified by the diocese in which he will take up residence.

H. If a deacon moves permanently outside the canonical jurisdiction of the Diocese of Lexington and seeks incardination in his new diocese of residence, he should follow the procedure specified by that new diocese.

305 – Administrative Leave

The Bishop may place a deacon on administrative leave for reasons not related to health, family circumstances or temporary relocation outside the diocese.

- A. A deacon on administrative leave will be relieved of all responsibility for any ecclesial office/function and participation in diaconal ministry.
- B. A deacon on administrative leave may not function or represent himself as a deacon while the leave remains in effect.
- C. Faculties will be suspended pending the resolution of the circumstances that gave rise to the administrative leave.

306 – Inactive Status

Deacons in inactive status in the Diocese of Lexington do not have any diaconal assignment, May not hold any ecclesiastical office and have no faculties within the diocese.

Deacons are in inactive status when...

- A. The deacon is removed from his diaconal assignment or not given a diaconal assignment by the Bishop.
- B. The deacon is a resident in the diocese, is incardinated in another diocese and has not requested assignment in the Diocese of Lexington.
- C. The deacon has exhausted the allowed two (2) years for a leave of absence.

307– Retirement

A deacon may request retirement whenever illness or other conditions prevent the proper exercise of diaconal ministry.

- A. When a deacon has completed his 75th year he must submit a letter of resignation to the Bishop who may either accept or defer the resignation. The resignation is from diaconal assignment or ecclesiastical office, not from the Order of Deacon.
- B. A retired deacon is encouraged to remain active in all functions of the Diaconal Community. He is entitled to all benefits and information accorded to deacons.

308 – Diaconal Obligations

Leave of Absence, Administrative Leave, Inactive Status, or Retirement do not relieve the deacon of his clerical obligations, e.g. praying the Liturgy of the Hours, being a faithful witness to the Church's teaching, etc.

SECTION 400 – ONGOING FORMATION

Deacons are ordained ministers in the Church and an increasingly educated society demands that deacons be knowledgeable and reliable witnesses to the Faith and spokesmen for the Church's teaching. As such, they should continually update their skills through formation and continual conversion to the Gospel. Ongoing formation for deacons is a requirement that ensures that deacons in the Diocese pursue a plan of formation throughout their lives in order to remain currently informed about the Church's teachings.

401– Ongoing Education

The subject matter of ongoing education must relate to the charitable, liturgical, sacramental, and theological aspects of the deacon's ministry. Ongoing education should include the gathering of background information to nourish current ministry or to prepare for future ministry. Courses that help one in ministry or prepare one to better serve the People of God should also be included.

A. Requirements

1. Each deacon shall complete a minimum of twenty (20) hours of ongoing education each year.
2. At least two (2) hours shall be in the area of homiletics each year and at least once every three (3) years the deacon must attend a homiletics workshop.
3. Activities that qualify as ongoing education must involve topics such as, but not limited to, history and background of the Church or diaconate; diaconal spirituality; service to the Church and community; homiletics; current issues of faith, theology, and formation in liturgical service (i.e. rubrics of: the Mass, Mass with a bishop, baptisms, matrimony, and burial services); and academic studies of theology, liturgy, and scripture.

B. Sources

1. National and Regional Conferences- Provide excellent sources through noteworthy keynote speakers and workshop presenters. Certificates of attendance indicating the number of credit hours issued for that conference will be available.
2. Formal Programs- Activities will include, but are not limited to, those that are offered by the Lexington Diocese, agencies of the Diocese, colleges, hospitals and social service institutions. Count one (1) hour of credit for each classroom hour attended.
 - a. Four (4) study sessions will be offered by the Diocese per year, on a quarterly basis. Deacons and their wives are strongly encouraged to participate in these sessions.
 - b. Three (3) of these sessions will be offered for deacons and their wives, who are encouraged to suggest session topics. The fourth session will be a joint session with priests of the Diocese.
3. Self-Study- Credit may be given for viewing videos, listening to audiotapes and podcasts, and reading written materials on topics identified in section 401(A)(3) above. The Director for the Permanent Diaconate should be contacted for approval in advance if a deacon has questions about the suitability of particular self-study materials. Count one (1) credit hour for each thirty (30) pages of reading and one (1) credit hour for each hour of viewing or listening.
4. Course Work- Credit for college course work toward a degree or certification in a theological subject shall be based on the number of hours, which is one (1) hour of credit for each contact hour.
5. Research and Publication- Credit may be earned for research that leads to publication in the form of an article, chapter or book, written in whole or in part, by the deacon himself.

C. Activities **not** acceptable for Ongoing Education Credit

- Travel Time
- Prayer Service
- Days of Recollection
- Diocesan Board meetings/functions
- Support Group meetings

- Support Group functions
- Courses not related to Diaconal ministry
- Conducting classes, workshops, retreats, etc.
- Informal meetings/discussions
- Spiritual Direction sessions
- Parish Council meeting
- Social Gatherings
- Spiritual or devotional reading

D. Paying for Ongoing Formation

The place of assignment is expected to assist financially with the deacon's annual ongoing education and will make available a reimbursement of a minimum of \$300 per year for him. This is in addition to the retreat discussed in section 402(B) below.

402 – Ongoing Spiritual Formation

Ongoing spiritual formation includes development of the spiritual dimension of the life of the deacon. The following represent the **minimum** requirements for the deacon to maintain a successful and fruitful formation program.

A. Liturgy of the Hours

A deacon is obligated to recite Morning and Evening Prayer from the Liturgy of the Hours every day. Morning and Evening Prayer should become a valued part of daily life (Directory n90).

B. Annual Retreat

1. To facilitate growth and conversion, active deacons are required by Canon Law to participate in a yearly retreat.
2. In the Diocese of Lexington, the deacon retreat requirement is at least a weekend in length given to spiritual growth and enlightenment.
3. The deacon community sponsors one retreat annually for all deacons and their wives, as well as the widows of deacons.
4. If a deacon is unable to attend this scheduled retreat, he is responsible for making his own arrangements and compliance records are to be submitted to the Director for the Permanent Diaconate.

a. An example of a qualifying alternate retreat involves sessions for reflection and prayer, either self-directed or led by a retreat master, and lasting at least as long as the annual retreat offered by the Diocese.

b. If the alternate retreat involves more hours than the Diocesan retreat and includes educational material or sessions, the time spent on the educational material may be counted as ongoing formation. When in doubt about this issue, a deacon should contact the Director for the Permanent Diaconate.

c. Deacons are encouraged to attend an alternate retreat every three (3) to five (5) years with a broader group of deacons from another diocese. This alternate retreat should focus on personal spiritual formation and growth.

5. The deacon's place of assignment will reimburse the deacon and his spouse for the cost of the retreat up at least the cost of the deacon community retreat.

C. Spiritual Direction

Spiritual direction is invaluable for diaconal service. Deacons are strongly encouraged to have a spiritual director with whom they confer regularly.

403 – Ministerial Development Review

The ministry of the deacon is to be reviewed in accordance with the provisions outlined in the Appendix. Implementation of the evaluation process is the responsibility of the Vicar General. It may be delegated to the Director of Deacon Personnel.

SECTION 500 – MISCELLANEOUS

501 – Special Liturgies

A. The entire "body of deacons" is expected to participate in special liturgies, including Ordination of deacon, priest or bishop, Chrism Liturgy, funerals of deacons, priests and bishops, etc.

B. Vested deacons will process in with other clerics and will sit with their wives in assigned places.

C. In the event of a funeral for the wife or minor child of a deacon, it is recommended that deacons (vested) and wives attend as a community.

502 – Deacons Moving into the Diocese

- A. Permanent Deacons, incardinated in another diocese, and wishing to serve in the Diocese of Lexington, must obtain proper faculties from the Bishop before exercising diaconal ministry.
- B. Permanent Deacons transferring to Lexington should contact the Director of Personnel for a personal interview.
- C. Before requesting incardination, the deacon must serve in diaconal ministry in the Diocese of Lexington for at least a period of three years.
- D. Following the probationary period, the deacon, by letter, must request excardination from his former diocese.
- E. Letters of recommendation from the bishop of a previous diocese must be requested and sent to the Bishop of Lexington.
- F. The Bishop of Lexington will prepare a decree of incardination and inform the bishop of the previous diocese that the incardination of the deacon has taken place.
- G. Incardination into the Diocese of Lexington is not complete until both documents have been executed and the bishops duly informed (*Canon 267 and Protocol for Incardination/Excardination of Deacons – Bishops' Committee on the Permanent Diaconate, March 1995*).

503 – Funeral of a Deacon

- A. The death of a deacon is in the event of sorrow and hope for the family of the deacon and the Christian community of the diocese. As a result, the celebration of his funeral takes on both a private and public nature. The desires of the deceased deacon and the surviving family will be given first consideration in the planning of the deacon's funeral.
- B. When notified of a death, the Director will notify the Bishop and appoint a member of the deacon community to act as coordinator to assist the deacon's family and the parish in planning the funeral. Coordinating activities, includes, but is not limited to the following:
 - 1. The Bishop should celebrate the Funeral Mass.
 - 2. Assistance should be offered to the family, the pastor, and parish planning group.

3. While the wishes of the family should be followed, it is appropriate that the deacon be vested in alb and stole. Christian symbols, such as stole, bible, Liturgy of the Hours Book, may be placed on the pall.
4. Assist in the selection of deacons and deacons/spouses to perform various ministerial functions at each of the services and coordinate these with the family, the pastor and the Diocesan Director of Worship.
5. Coordinate the liturgies to arrange vesting areas, seating and processions, etc.
6. Notify the Bishop's Office and the Personnel Director of all funeral arrangements.

504 – Clerical Attire

In the Diocese of Lexington, deacons are encouraged to wear the diaconal cross lapel pin or the larger diaconal cross on a neck chain. The deacon may wear the gray clerical shirt.

505 – Clerical Title

In all forms of address for permanent deacons, the appropriate title "Deacon." The Bishop may designate certain formal correspondence where the title, "Rev. Mr." may be used for the permanent deacon.

506 – Deacon Assistance Fund

In situations of need, the Diocesan Church should assist deacons and their families in need (*Directory* n. 94). The deacon community should take the primary responsibility for providing this assistance. The diocese has established the Deacon Assistance Fund. Periodically, deacons and their families will be asked to contribute to the fund to build a reserve. This fund will also be used to establish a memorial to deceased deacons and their wives. The Deacon Assistance Fund was formerly identified as "Deacon Community Fund."

APPENDIX
MINISTERIAL DEVELOPMENT REVIEW

I. MINISTERIAL DEVELOPMENT

The ministerial development of our clergy (priests and deacons) and our lay professionals is essential to the long-term success of our Pastoral Plan with its five (5) interlocking Mission Priorities. The deacon ministerial development process recognizes and acknowledges several critical realities to diaconal ministry:

1. As set forth in the *National Directory for the Formation, Ministry, and Life of Permanent Deacons in the United States* (pages 18-21), the primary functions of the deacon are liturgy, Word, and charity/justice. As such, ministerial development should specifically address these three functions.
2. The primary vocation of the vast majority of our deacons is their wife and family.
3. The majority of our deacons have full-time jobs, which are the source of livelihood for their families.
4. The vast majority of our deacons serve in unpaid capacities and, therefore, their ministerial review has a unique perspective.

II. MINISTERIAL DEVELOPMENT REVIEW

- A. The deacon ministerial development review provides positive accountability and affirmation while, at the same time, assists deacons in their growth as servants of God. A deacon's written ministerial review is both a review of his ministry and a plan for ministerial development moving forward.
- B. The annual deacon ministerial development review shall encompass the period from July 1 to June 30 of the following year.
- C. The deacon ministerial development review is the responsibility of the parish priest/supervisor. However, the deacon must be proactive throughout the process.
- D. The deacon ministerial development review is based on the deacon's Letter of Appointment and the needs of the parish as reflected in the specific goals/objectives set forth annually by the deacon and his parish priest/supervisor.

E. Past accomplishments, affirmations, recommendations, new requirements, action plans and goals are all essential ingredients to the deacon ministerial development review process.

F. The deacon's active participation in the review process is critical to the success and purpose of the review.

III. TIMELINE FOR ANNUAL MINISTERIAL DEVELOPMENT REVIEW PROCESS

A. **July 15th** - The deacon shall complete and provide the following to his parish priest/supervisor and shall send copies to the Office of the Permanent Diaconate:

1. Section 1, Section 2 (appropriate Parts), and Section 3 (Part 1) of the Ministerial Development Review Form
2. Addendum 1 (Spiritual Direction, Retreat, and Ongoing Education Logs) to the Ministerial Development Review Form

B. **July 30th** – The parish priest/supervisor will review these documents and complete Section 2 (appropriate Parts), Section 3 (Part 2), Section 4, and Section 5 of the Ministerial Development Review Form.

C. **August 15th** – The parish priest/supervisor will meet with the deacon for the deacon ministerial development review/goal setting session.

1. The deacon shall INITIATE the scheduling of the meeting.
2. The parish priest/supervisor is RESPONSIBLE for ensuring the meeting occurs by August 15th.

D. **September 1st** – The parish priest/supervisor will forward the completed, signed original Ministerial Development Review Form and Addendum to the Office for the Permanent Diaconate.

IV. MINISTERIAL DEVELOPMENT REVIEW/GOAL SETTING MEETING

A. At this meeting, the parish priest/supervisor and deacon will review and complete the Ministerial Development Review Form, including the goal setting parts in Sections 2 and 3.

B. Consistent with the needs of the parish and in support of the Pastoral Plan and its five (5) interlocking Mission Priorities, the parish priest/supervisor and deacon will at minimum:

1. Discuss a plan for the deacon's continued growth in ministry;

2. Agree on the deacon's key responsibilities and assignments;
3. Determine results expected for each of the deacon's key responsibilities; and
4. Agree on what deacon expenses the parish will pay, including and amount for the deacon and his wife to attend an annual retreat, an allowance for ongoing formation, and other appropriate expenses. (Specifics concerning appropriate expenses are available from the Office for the Permanent Diaconate).

V. RECORD-KEEPING

- A. A copy of the completed Ministerial Development Review Form and Addendum signed by the parish priest/supervisor and the deacon will be given to the deacon at the conclusion of the ministerial development review/goal-setting meeting.
- B. The parish priest/supervisor may keep a copy of the completed, signed Ministerial Development Review Form and Addendum in a confidential personnel file, but not in any parish files open to the public.
- C. The parish priest/supervisor is RESPONSIBLE for forwarding the completed, signed original copy of the Ministerial Development Review Form and Addendum to the Office of the Permanent Diaconate. This original copy will become part of the deacon's personnel file maintained in the Office of the Chancellor at the Catholic Center.

VI. RESPONDING TO A MINISTERIAL DEVELOPMENT REVIEW

- A. The deacon's signature on the completed Ministerial Development Review Form is required. This signature does not signify agreement or disagreement with the review. It simply signifies the deacon has received the review and been furnished with a copy of the review.
- B. A deacon is entitled to respond in writing to his review.
 1. A copy of the written response must be presented to the parish priest/supervisor no later than two (2) weeks after the conclusion of the deacon ministerial review/goal setting meeting.
 2. The signed original of the written response must be provided to the Office of the Permanent Diaconate along with an indication of the date the deacon provided a copy of the written response to the parish priest/supervisor.
 3. A written response becomes part of the review and will be maintained in the deacon's personnel file in the Office of the Chancellor at the Catholic Center.

VII. MINISTERIAL DEVELOPMENT REVIEW AND REASSIGNMENT

A. Reassignment of parish priest/supervisor on the normal effective date of July 1

1. As soon as the reassignment is publicly announced, the deacon and parish priest/supervisor shall begin the review process set forth above.
2. The completed, signed Ministerial Development Review Form and Addendum are to be forwarded to the Office for the Permanent Diaconate by July 1st. (In no case can this extend beyond August 1st.)

B. Reassignment of parish priest/supervisor on date other than July 1

The parish priest/supervisor and deacon are to complete the review process and forward the completed, signed Ministerial Development Review Form and Addendum to the Office for the Permanent Diaconate within forty-five (45) days of the effective date of the parish priest's/supervisor's reassignment.

C. Reassignment of deacon

The parish priest/supervisor and deacon shall completed the review process and forward the completed, signed Ministerial Development Review Form and Addendum to the Office for the Permanent Diaconate with forty-five (45) days of the effective date of the deacon's reassignment.

VIII. MINISTERIAL DEVELOPMENT REVIEW AND ASSIGNMENT (OTHER)

A. New assignment of either parish priest/supervisor or deacon

When either a parish priest/supervisor or deacon is newly assigned to a parish, the parish priest/supervisor and the deacon shall have an initial joint meeting within thirty (30) days of the effective assignment date. The parish priest/supervisor and deacon shall jointly complete Section 2 and Section 3 (Part 3) of the Ministerial Development Review Form at this initial joint meeting.

B. Deacon with two (2) parish assignments and two (2) parish priests/supervisors

When a deacon has assignments in two (2) different parishes with two (2) different parish priests/supervisors, the deacon and both parish priests/supervisors will completed separate Ministerial Development Review Forms – one (1) for each parish assignment. The same Addendum shall accompany both Ministerial Development Review Forms. The deadlines set forth in Section III above apply.

C. Deacon with one (1) parish assignment and one (1) non-parish ministerial assignment

1. When a deacon is assigned to both a parish and another non-parish ministerial assignment such as prison ministry, hospital ministry, deacon formation class leader/supervisor, or an unpaid assignment at the chancery, the deacon shall obtain a letter from the priest/supervisor of his non-parish ministerial assignment that, at minimum...

a. describes the deacon's duties and responsibilities,

b. provides a summary of the deacon's accomplishments of such duties and responsibilities,

c. explains, if applicable, any specific strengths of the deacon and areas that need improvement (and the plan for any such improvement), and

d. discusses the mutual expectations of the deacon and his priest/supervisor for the upcoming year.

2. This letter shall be signed by both the priest/supervisor and the deacon indicating they have met to review the letter and to establish mutual expectations for the upcoming year.

3. The deacon's signature does not indicate agreement or disagreement with the review. It simply signifies the deacon has received the review, has taken part in setting the mutual expectations for the upcoming year, and has been furnished with a copy of the review.

4. The deacon shall include this letter with the Ministerial Development Review Form forwarded to his parish priest/supervisor.

5. The deacon and the priest/supervisor for the non-parish ministerial assignment are jointly responsible for ensuring this letter is completed in a timely fashion so that the letter can accompany the Ministerial Development Review Form given to the parish priest/supervisor.

6. The priest/supervisor for the non-parish ministerial assignment may keep a copy of the letter in confidential personnel files but not in any parish/office files that are open to the public.

7. A deacon is entitled to respond in writing to the letter from his priest/supervisor for a non-parish ministerial assignment. The process outlined in Section VI above is to be followed.

MINISTERIAL DEVELOPMENT REVIEW FORM

To be completed by the DEACON and the PASTOR/PARISH PRIEST or DEACON SUPERVISOR

Deacon's Name: _____ Month/Year of Review: _____

Parish Name or Agency Name: _____

Name of Priest or Deacon Supervisor: _____

General Instructions: Deacons complete their portions of this Ministerial Development Review Form and Addendum 1 NO LATER THAN JULY 15 and deliver them to their priest/supervisor (with a copy to the Office for the Permanent Diaconate) by JULY 15. Priests/supervisors complete their portions of this form NO LATER THAN AUGUST 15. This completed, signed form and Addendum are to be sent by the priest/supervisor so as to be RECEIVED by the Office for the Permanent Diaconate ON or BEFORE SEPTEMBER 1.

Specific Instructions: The deacon being reviewed completes Section 1, Section 2 (applicable Parts), and Section 3 (Part 1) **PRIOR** to submitting this form to his priest/supervisor. The priest/supervisor completes Section 2 (applicable Parts), Section 3 (Part 2), Section 4, and Section 5 **PRIOR** to the review meeting. At the review meeting, the deacon and the priest/supervisor review the priest's/supervisor's comments in the aforementioned sections and jointly agree on the deacon's goals for the upcoming period. They record these goals in Section 2 (Part 3) and Section 3 (Part 3).

SECTION 1: OVERALL MINISTRY (completed by the Deacon)

Part 1: Please describe an experience that energized you (your most rewarding experience in ministry) during the last year and please describe how you plan to build on this positive experience during the upcoming year:

Part 2: Please describe an experience that drained you in ministry (perhaps, your most discouraging experience in ministry) during the last year and please describe anything you plan to change in this area during the upcoming year:

Part 3: Please describe/summarize your prayer life:

Part 4: Please describe how you see your diaconal ministry and spiritual life developing in the next 3-5 years:

Part 5: What can you do to help yourself with your ministerial and spiritual growth as a deacon?

Part 6: What can your parish/priest do to help you with your ministerial and spiritual growth as a deacon?

Part 7: What can the Diocese do to help you with your ministerial and spiritual growth as a deacon?

SECTION 2: THE ROLES OF A DEACON (completed by the Deacon and the Priest/Supervisor as indicated)

LITURGY

Part 1: (completed by the Deacon) Describe what your agreed-upon goals were for this aspect of ministry during this period and describe your accomplishment/progress toward meeting each of these goals (use a separate sheet of paper if necessary).

Part 2: Priest/supervisor comments reference the deacon's function as a minister of the Liturgy during the review period (use a separate sheet of paper if necessary).

Part 3: In conjunction with your priest/supervisor, describe what your goals are for the Liturgy aspect of your ministry during the upcoming period (use a separate sheet of paper if necessary).

WORD

Part 1: (completed by the Deacon) Describe what your agreed-upon goals were for this aspect of ministry during this period and describe your accomplishments/progress toward meeting each of these goals (use a separate sheet of paper if necessary).

Part 2: Priest/supervisor comments reference the deacon’s function as a minister of the Word during this period (use a separate sheet of paper if necessary).

Part 3: In conjunction with the priest/supervisor, describe what your goals are for the Word aspect of your ministry during the upcoming period (use a separate sheet of paper if necessary).

CHARITY AND JUSTICE

Part 1: (completed by the Deacon) Describe what your agreed-upon goals were for this aspect of ministry during this period and describe your accomplishments/progress toward meeting each of these goals (use a separate sheet of paper if necessary).

Part 2: Priest/supervisor comments reference the deacon’s function as a minister of Charity and Justice during this period (use a separate sheet of paper if necessary).

Part 3: In conjunction with the priest/supervisor, describe what your goals are for the Charity and Justice aspect of your ministry during the upcoming period (use a separate sheet of paper if necessary).

SECTION 3: OTHER DEACON ACCOMPLISHMENTS NOT DISCUSSED IN SECTIONS 1 OR 2 (completed by the Deacon and Priest/Supervisor as indicated)

Part 1: (completed by the Deacon) Describe what your agreed-upon goals were for additional areas of ministry during this period and describe your accomplishments/progress toward meeting each of these goals (use a separate sheet of paper if necessary).

Part 2: Priest/supervisor comments reference the deacon’s function in additional areas during this period (use a separate sheet of paper if necessary).

Part 3: In conjunction with the priest/supervisor, describe what your goals are for additional areas of your ministry during the upcoming period (use a separate sheet of paper if necessary).

SECTION 4: QUALITIES & SKILLS (completed by the Priest/Supervisor)

Priests/supervisors shall use the following performance rating system for this Section 4. NOTE: Priest/supervisor comments are REQUIRED for any rating of 1, 2, 4, or 5. Priest/supervisor comments are optional for any rating of 3. A rating of 3 is the expected norm, hence the vast majority of ratings should be 3s.

- 5 Excellent
- 4 Above Average
- 3 Acceptable (Meets requirements/standards)
- 2 Below Average
- 1 Poor
- N Not Applicable or Not Observed

SKILLS	RATING	COMMENTS (use a separate sheet of paper if necessary)
<u>Pastoral Qualities</u>		
Serves as a bridge between pastor and people	5 4 3 2 1 N	_____
Assisting or presiding at parish liturgies/prayer	5 4 3 2 1 N	_____
Is a good listener	5 4 3 2 1 N	_____
Uses conflict management skills	5 4 3 2 1 N	_____

Able to appropriately confront another	5 4 3 2 1 N	_____
Overall preaching skill	5 4 3 2 1 N	_____
Demonstrates empathy/compassion for people	5 4 3 2 1 N	_____
Knows the people of the parish and they know him	5 4 3 2 1 N	_____
Is comfortable relating to women	5 4 3 2 1 N	_____
Is comfortable relating to minorities	5 4 3 2 1 N	_____
Is comfortable relating to people of other faiths	5 4 3 2 1 N	_____
Is attuned to the boundaries related to men, women, and children	5 4 3 2 1 N	_____
Maintains a spirit of hope	5 4 3 2 1 N	_____
Proclaims the Gospel	5 4 3 2 1 N	_____
<u>Leadership Qualities</u>		
Consults others when needed	5 4 3 2 1 N	_____
Delegates appropriately	5 4 3 2 1 N	_____
Plans, organizes, and sets goals	5 4 3 2 1 N	_____
Manages effectively under pressure	5 4 3 2 1 N	_____
Affirms co-workers	5 4 3 2 1 N	_____
Shows initiative	5 4 3 2 1 N	_____
Is a good time manager	5 4 3 2 1 N	_____
Takes responsibility for his actions	5 4 3 2 1 N	_____
Sets the example in appearance, word, and action	5 4 3 2 1 N	_____
An effective informal teacher	5 4 3 2 1 N	_____
Accepts "constructive criticism"	5 4 3 2 1 N	_____
Is easy to approach and talk to	5 4 3 2 1 N	_____

Is flexible and adaptable 5 4 3 2 1 N _____

Administrative Qualities

Holds/participates in meetings 5 4 3 2 1 N _____

Complies with diocesan policies 5 4 3 2 1 N _____

Serves as a good steward of parish resources (financial or otherwise) 5 4 3 2 1 N _____

Completes reports clearly and on time 5 4 3 2 1 N _____

Serves on parish committees as requested 5 4 3 2 1 N _____

Personal Qualities

Personifies love, understanding, and sensitivity in interpersonal relationships 5 4 3 2 1 N _____

Takes appropriate time for self and family 5 4 3 2 1 N _____

Displays a positive attitude 5 4 3 2 1 N _____

Has a good sense of humor 5 4 3 2 1 N _____

OVERALL REVIEW OF DEACON 5 4 3 2 1

SECTION 5: SUMMARY (completed by the Priest/Supervisor)

Summary of Strengths

A. _____

B. _____

Summary of Improvement Needed

A. _____

B. _____

Specific Goal(s) for Improvement (other than those set forth in Section 2 and Section 3)

A. _____

B. _____

C. _____

General Comments

Signature: _____

(DEACON)

Date: _____

Signature: _____

(PASTOR/PARISH PRIEST/SUPERVISOR)

Date: _____

The original of this completed, signed Ministerial Development Review Form and the completed Addendum are to be SENT BY THE PRIEST/SUPERVISOR to the Office for the Permanent Diaconate so as to be RECEIVED by the Office for the Permanent Diaconate ON or BEFORE SEPTEMBER 1. Copies of this Ministerial Development Review Form and the Addendum may be kept in a confidential personnel file by the priest/supervisor.

DEACON’S SPIRITUAL DIRECTION, RETREAT, AND ONGOING EDUCATION LOG

NAME _____ For the Period _____

Please complete this form annually and attach it to your Ministerial Review Form.

Spiritual Direction:

1. Do you have a Spiritual Director? Yes _____ No _____
2. If yes, are you meeting with your Spiritual Director as needed? Yes _____ No _____
3. If yes to #1, do you consider your relationship with your Spiritual Director helpful/beneficial to you? Yes _____ No _____ Why or why not? _____
4. If no to #1, do you need help finding a Spiritual Director? Yes _____ No _____

Retreat(s)

1. Retreat(s) attended this year (July 1 to June 30)

Location(s) _____

Date(s) of the Retreat(s) _____

Title(s) of the Retreat(s) _____

2. If you did not attend the Diocesan Deacon Retreat, why this choice? _____

Ongoing Education

Deacons in the Diocese of Lexington are expected to accrue a minimum of twenty (20) actual hours of continuing education each year in addition to the annual retreat. The deacon community will sponsor approximately ten continuing education hours per year for deacons and their wives. The deacon couple is strongly encouraged to take advantage of these offerings. Various other agencies inside/outside the diocese offer programs to assist deacons seeking to update their skills. Reading, listening to podcasts, or viewing videos are valid ways of updating one’s professional ministry. However, it is recommended that their use should not count for more than ten (10) hour of the total.

Courses/Seminars/Study Days/Videos/Podcasts/Books, etc.
(Please List Below – use a separate sheet of paper if needed)

of Hours

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Total Hours: _____

Signature _____

Date _____