

Schools: Pontifical College Josephinum and St. Bernard's School of Theology and Ministry
Project Title: "Formation Programming Model for Permanent Deacons"

(Revised) Project Abstract

This grant, "Formation Programming Model for Permanent Deacons," developed a model permanent diaconate formation that entails core curriculum requirements and precise metrics for assessment. The grant project was housed at the Pontifical College Josephinum, a Catholic college and ATS member school. Deacon Michael Berstene, the director of planning Diaconate Institute there, will co-direct the project, together with Dr. Ella Johnson, a faculty member from St. Bernard's School of Theology and Ministry.

The project emerged from the work of the Permanent Diaconate Program peer group, which was engaged in the Association of Theological Schools (ATS) project, "Educational Models and Practices in Theological Education." Our group found the current guidelines, contained in the United States Conference of Catholic Bishops' (USCCB) 2003 edition of the *National Directory for the Formation, Ministry, and Life of Permanent Deacons in the United States*, to be well developed and robust. They outline the formation dimensions and requirements that constitute a diocesan formation program for deacons in their journey from aspirants, to candidates, to post-ordination. These formation requirements call for the development of the whole person to be achieved by continual integration of four specific areas—human, spiritual, intellectual, and pastoral.

At the same time, the experience of our ATS peer group was that the implementation of these guidelines has not yet been fully realized and educational resources are often lacking. Through our peer group's initial conversations with a core member of the USCCB's Committee on Clergy, Consecrated Life and Vocations (CCLV), we identified the central problem with current permanent diaconate education/formation to be: a lacuna between vision and implementation. We are concerned that the formation programs in each individual diocese still lack an effective model that guides and unites them.

The model we are developing in our grant seeks to uphold the particular criteria for permanent deacon programs set out in the *National Directory* (e.g., requirements, norms, model standards for readiness for admission into each of the three paths of the program). The project is working towards outlining best practices for its practical interpretation and implementation in the church and theological schools and programs in North America.

The project continued the work of our peer group by having facilitated a 1-year process of shared discernment with select members from our peer group and from the USCCB, CCLV, and NADD around the distinctive values and practices of permanent diaconate education and formation in several Catholic colleges and universities throughout the US and Canada.

Our work has been divided over three major activities. The first activity entailed a series of conference calls, which gathered faculty, staff and diaconate directors from our ATS "Educational Models and Practices Peer Group Forum" Diaconate Program peer group. The second initiative was a national meeting at the Pontifical College Josephinum from May 7-8, 2018. The meeting brought together selected members from the first meeting (including original

peer group members, but also additional experts in the field, from the CCLV, NADD and USCCB, who are heavily involved in permanent diaconate formation. The final activity of the grant will include work to publish our project's findings. Interest in and promotion of such a has been indicated by the USCCB, NADD, CCLV, and *Josephinum Diaconal Review*. Work in this phase of the project will include an initial first draft of the project's findings by the grant's co-directors, then grant participants' vetting of this draft, and finally assistance from outside experts in the field.

Primary Goals

The primary goal of our project was to address the lacuna between the vision and implementation of *National Directory*. It sought to do this through three primary activities, each with its own objection: 1) First we had meetings, through a series of video-conference calls, which gathered faculty, staff and diaconate directors from our ATS "Educational Models and Practices Peer Group Forum" Diaconate Program peer group to share best practices, to set themes for the one-year period, and to discuss and assess our peer group's results from the previous year's work of the group. 2) Next we had a national meeting which brought together selected members from the first meeting (including original peer group members) with members from the CCLV, NADD and USCCB. The goal of this meeting was to produce a model of implementing the *National Directory* by reflecting in a structured way on a set of recommended best practices for permanent diaconate formation programs. 3) Finally, we set out to have another national meeting in which we work on a publication of our project's findings. The publication will take the form of a possible sourcebook of best practices and recommendations for the implementation of the *National Directory*.

Attainment of Goals

Overall, the project attained its primary goal of addressing the lacuna between the vision and implementation of the National Directory. This was done by generating a list of best practices and recommendations for the implementation of the directory in permanent diaconate programs.

The project successfully held two meetings. However, the first meeting was not a face-to-face national meeting, as the project had initially planned. Due to scheduling conflicts among the project's participants, the co-directors decided instead to hold a series of conference calls (2 major conference calls held on April 3 and April 17, 2018) for whichever participants from our original peer group could attend. In these two meetings, we were able to gather seven (7) members from our original Permanent Diaconate Program peer group, as well as an ATS staff member, and one outside expert relating to deacon wives' formation. In the meetings, we successfully discussed and assessed our peer group's results from the previous year's work of the group, specifically those that pertained to the scope of this project. We were also able to begin to discuss what integration of the four dimensions of formation (intellectual, human, spiritual, and pastoral) looks like in deacon formation, and finally, we began to share best practices relating to integration of the four dimensions and to set themes for our May 7-8, 2018 national meeting.

The May 7-8, 2018 national meeting gathered twelve participants at the Pontifical College Josephinum. Participants included five members from our original Permanent Diaconate

Program peer group (including two professors/formators and three permanent deacon directors), one ATS staff member, two members from the NADD, two members of the USCCB (one of which is also a member of the International Diaconate Commission), one editor of the *Josephinum Diaconal Review* and one outside expert, who is the rector at St. Mary's and Borromeo seminaries. Our work achieved the following objectives: defined an understanding of what integration of the four dimensions (intellectual, spiritual, pastoral and human) entails; identified main obstacles to the implementation of the *National Directory*; began to articulate best practices and resources, in a fairly specific way in the form of a recommended portfolio exercise, for the implementation of the *National Directory*.

At our May 2018 national meeting we articulated next steps for our project, and outlined a plan and schedule for work on these steps: to publish our project's findings. Interest in and promotion of such a has been indicated by the USCCB, NADD, CCLV, and *Josephinum Diaconal Review*. Because we had a series of conference calls, rather than a national meeting, for the first activity of our grant project, we have extra funds within our budget to be delegated toward some of these next steps.

Crucial Issues and Questions Engaged

The issue the project sought to address is that many permanent diaconate formation programs are not integrating the four pillars of formation (intellectual, spiritual, pastoral and human), but rather are conducting intellectual formation in various forms by affiliating with Catholic universities or colleges, and carrying out spiritual, pastoral, and human formation, again in various forms, with diocesan personnel. Even programs in which the diocese takes on the intellectual formation tasks, the integration is largely incidental and not well integrated. The result is a fragmented approach to formation, with little cross-pollination across the four pillars.

In addition, the quality of diaconate formation and education is dependent upon the value assigned and the resources allotted to it within each particular diocese; for this reason, the quality and even level (e.g., graduate, certificate) and duration of diaconate formation programs vary considerably from diocese to diocese across the US. While some variance is understandable and even necessary, given each bishop's governance of his diocese and pastoral sensitivity to its particularities, the disparity of programs seeking to implement the *National Directory* across the US is problematic.

Significant Challenges and Obstacles

The project engaged this concern by asking: What specifically are the obstacles to implementing the robust vision of diaconate formation outlined in the *National Directory*? In response to this question, the participants identified the following obstacles:

- Lack of resources
 - Financial Viability
 - Programs for the formation of permanent deacons are often funded by the dioceses that send candidates. Sometimes costs are shared by parishes and occasionally by the candidates themselves. Perhaps a greater challenge is the more common lack of funding for continuing education to support the ongoing formation of permanent deacons.

- Time
- An adequate implementation of the *National Directory*'s vision of formation is 8 years (from the inquiry stage to the recommended post-ordination stage). The implementation of this vision thus requires a significant time commitment from both the person in formation and the dioceses and schools training him.
- Lack of understanding in the church and some personnel and faculty members involved in formation about the *National Directory*. Formation and assessment is therefore often based on subjective decisions.
- High turnover rate/short tenure (5-6 years) for deacon directors; many are young and only newly ordained.
- Lack of collaboration between all persons involved in a single deacon candidate's formation—e.g. spiritual director, bishop, pastor, diaconate office, candidate, formators, mentors, spouse,
- Lack of programs equipped to provide instruction in Spanish, which is pressing given the growing Spanish-speaking population in the United States.

Significant Opportunities/Benefits

Across North America, the permanent diaconate is a growing ministry within the church. Schools educating men for this ministry need a model for how to implement the vision of *National Directory* in an integrative way. Through providing such a model, there is an important opportunity to educate the church about the vision and how dioceses, theological schools and formators might better implement the vision in preparing students for that ministry.

The grant project drew together schools and deacon directors in dioceses with robust programs of preparation of the permanent diaconate for long periods of discussion. These discussions served as a fruitful nexus point for the collaboration and sharing of resources and best practices for implementing the vision of formation put forth by the *National Directory*. The participants composed a working list of these resources and practices, and in particular, began to outline the details of a recommended portfolio practice to be used in diaconate formation for measuring proficiency in the *National Directory*'s standards for readiness.

There is discussion of developing electronic software as a tool to enhance the use of portfolios for students training for the permanent diaconate. If appropriate forms and systems can be devised, such software could provide an important tool for the many persons involved in deacon formation (e.g., local ordinary, priest, mentor, spiritual director, field education supervisors, local parish, faculty members, advisors) to communicate and cross-pollinate their work in forming students.

Participants in the project are connected with persons and organizations supporting the work of permanent deacons, such as the NADD, USCCB, the USCCB sub-committee on CCLV and the *Josephinum Diaconal Review*. These connections provide the opportunity for publishing the grant project's findings on best practices and resources for diaconate formation and disseminating the publication in an effective way.

Such a publication could serve as a resource-book of best practices for dioceses and ATS member schools to provide the theological education that is needed to better implement the *National Directory*'s vision for formation of permanent deacons.

Learning for the Benefit of Our Schools

A number of agreed upon principles have emerged from the group's conversation, including the following:

- Permanent deaconate formation should be integrative; both in terms of study (e.g., theological methods, pedagogical approaches, assessment) and across the areas of formation.
- Deacon intellectual formation must nurture the ability to apply knowledge to pastoral, human, and spiritual situations.
- Integration of the four dimensions often occurs in pastoral settings, and it always occurs within the human person herself/himself.
- The four dimensions of formation provide the central model for the formation of deacons, in conjunction with the three principal tasks of the deacon—i.e., participation in the church's ministry of the Word, Liturgy, and Charity. All four dimensions of formation need to occur in each of the three tasks, which means we may consider twelve (4x3) dimensions of deacon formation.
- The development of formation programs in Spanish, with appropriate courses, well-qualified instructors, and suitable textbooks needs to be ongoing.

Key Recommended Practices

The project identified the following elements as essential for permanent deacon formation programs:

- Theological method that promotes self-reflection
 - The National Directory is clear that proper theological reflection assists in integrating the four dimensions of formation (#133). Recommended assignments for theological reflection include case studies, self-assessment, peer review.
- Faculty members that understand formation and theological reflection
 - Professional development days to train faculty on the importance of formation and integration of its four pillars may be helpful. Handouts giving examples of integrative assignments may also assist some faculty members.
- Multi-dimensional assessment
 - Every course, in some way, should assess and integrate the intellectual, spiritual, pastoral and human dimensions of formation. This should happen in its assignments and assessments.
- A portfolio practice as a capstone exercise

- The portfolio has the opportunity of providing an integrative mode of formation and evidence-based assessment for permanent deacons. It encourages the student to make connections between courses, to regularly self-assess, to integrate the different dimensions of his formation within himself.

- Programs to serve and assist the formation of spouses and children as well as the permanent deacon candidates.

Learning that may Benefit other ATS Schools

The project participants' share agreement about the following principles for theological education, in general, in contemporary North America.

- Cultural competence and sensitivity are central for theological education to the permanent diaconate, given the rapidly changing demographics in North America.
- Formation across all four dimensions is crucial in theological education.
- Faculty must be adequately trained in the pedagogy and assessment of formation.
- Related to the pedagogical model of Competency-Based Education, formation for ministerial students should begin with desired student outcomes and shape curriculum and coursework to achieve those outcomes. This process is often referred to as “reverse engineering” or “backward design.”

Unexpected Insights, Innovative Ideas, and Possibilities

The grant project had the opportunity of collaborating with Fr. Mark Latcovich, one of the main writers of *In Fulfillment of Their Mission - The Duties and Tasks of a Roman Catholic Priest: An Assessment Project*. This book outlines a portfolio used to assess—in an integrative way-- students preparing for ordained priesthood. This collaboration has the benefit of providing tips and shared resources for developing such a portfolio for permanent diaconate formation.

The group had the innovative idea of recommending that ATS schools and dioceses involved in diaconate formation collaborate resources for educating their faculty members and formation personnel about what formation is and how to assess it. Future work in this area may include work to capture a model of what this may look like. The group discussed possible webinars, bibliographies, handouts etc. to be shared across dioceses and schools.

Implications for the Possible Redevelopment of the Standards of Accreditation

The grant project continues to affirm the following areas identified by the Permanent Diaconate Program peer group's report for the “Emerging Models and Practices in Theological Education” project.

- Re-evaluation of the rule that limits the number of students in degree programs without baccalaureate degrees to 15%. The group finds that this limit may create difficulties for programs with smaller enrollment numbers and especially programs and those that serve non-traditional constituencies.
- The group recommends that the Standards recognize synchronous distance education as counting toward residency requirements. Many dioceses cover a broad geographic territory, which makes students' travel to and from the school's campus a challenge. Flexibility in this area could relieve the time and travel constraints on students and also promote other ways of building the learning community.
- The Standards may emphasize the need for intercultural competencies to an even greater extent. The group often discussed the demographic changes in the U.S. and Canada--particularly their affect on the Catholic Church—and how ministerial leaders must be equipped effectively to serve across cultural differences, now more than ever.
- Group members agree that there is unequal emphasis across programs on the areas of formation. A more equal emphasis on all areas of formation may be stressed by the Standards.
- The Association might consider accrediting Certificate credentials and/or strengthen efforts at consistency by recognition of Certificate credentials, given the large number of students in ministry enrolling in non-degree programs.

One new areas of implication for the Standards emerged in the grant project:

- The Standards may strengthen the emphasis on the need for faculty, who work in degree programs preparing students for ministry, to have the training and competency necessary for teaching such students—i.e., pedagogical approaches and theological methods appropriate for training ministers, and an understanding of the different dimensions of integration (intellectual, spiritual, human, and pastoral) and how these are integrated in the student.

Sustaining our Learning in Culture of Innovation in our Schools

The grant participants are committed to continuing work on this project, particularly in the following ways:

- Organizing another meeting, perhaps in the Fall of 2018, with participants from our May 7-8 meeting to vet a draft of our publication on best practices and resources for the implementation of the *National Directory*
- Members from our project involved in ATS member schools are committed to ongoing work and development in the following areas:
 - a publication of the work of this grant, specifically for other schools and dioceses involved in deacon formation
 - a detailed portfolio program and assessment schema, with the possibility of electronic software for its use, for deacon formation programs
 - formation programs and resources for the wives and children of men in diaconate formation programs.

- Spanish language programming and resources for permanent deaconate formation, specifically with the directors from and results of the other ATS innovation project growing from our original peer group, “Spanish Curriculum for Permanent Deacon Formation.”

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APPENDIX

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