

National Guidelines for Deacons

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I am presently engaged in some research on national and diocesan guidelines for deacons as part of a project in which I am examining the pastoral and theological dimensions of the Directory for the Ministry and Life of Permanent Deacons (Congregation for Clergy, 1998). This whole project sits within an investigation into the reception of the ministry of deacons in the Catholic Church. The research so far reveals some interesting, or dare I say, startling results. I have had cause to wonder what sources are being used. Sometimes I encounter fundamental errors concerning canon law, liturgical law and practice or even errors in theology, especially the theology of Holy Orders. All this will be revealed at another place and time in journal articles and other publications.

I want to focus here on the very idea of national guidelines for deacons and three fundamental questions; what those guidelines should include, what they should not include and how we can know this. I am not writing with an academic audience in mind but simply with four audiences in view; deacons, those who work with them, those who form them and bishops. Partly I am prompted by the fact that I am immersed in guidelines from different nations and dioceses in the USA, UK, Canada and Australia and in part by the fact that somewhere and at some time revised Australian Guidelines are to appear to replace those that expired in 2005.

How do we know?

I want to start with the last of the three fundamental questions. How do we know what national guidelines should contain and what they should not contain? We can know by asking who says we should have them and what do they expect we should include in them? After all the bishops did not spontaneously decide that they wanted to create guidelines and deacons did not request guidelines, so who did and to what purpose?

The answer is to be found in the *Ratio fundamentalis institutionis diaconorum permanentium (Ratio hereafter)*, issued by the Congregation for Catholic Education in 1998, and is commonly known as the Basic Norms for the Formation of Permanent Deacons. The *Ratio* is a companion piece to the *Ratio fundamentalis institutionis sacerdotalis*, on priestly formation. This is what the Congregation for Catholic Education and the Congregation for Clergy have to say about the purpose of the *Ratio* in their joint declaration to the Norms and Directory for Permanent Deacons:

The *Ratio fundamentalis institutionis diaconorum permanentium*, prepared by the Congregation for Catholic Education, is intended not only as a guideline for the formation of permanent Deacons but also as a directive of which due account is to be taken by the Episcopal Conferences when preparing their respective "Rationes". As with the *Ratio fundamentalis institutionis sacerdotalis*, the Congregation offers this aid to the various Episcopates to facilitate them in discharging adequately the prescriptions of canon 236 of the Code of Canon Law and to ensure for the Church, unity, earnestness and completeness in the formation of permanent Deacons.

We can see from this rather long quote that the *Ratio* is intended as a guideline for each Episcopal conference to prepare a national *ratio* or their local norms for formation of deacons. This is to assist them to discharge their responsibilities under can 236:

Can. 236 According to the prescripts of the conference of bishops, those aspiring to the permanent diaconate are to be formed to nourish a spiritual life and instructed to fulfil correctly the duties proper to that order:

1/ young men are to live at least three years in some special house unless the diocesan bishop has established otherwise for grave reasons;

2/ men of a more mature age, whether celibate or married, are to spend three years in a program defined by the conference of bishops.

So we learn that the need to have guidelines has come at the request of the Holy See via the Congregations for Catholic Education and for Clergy. The request is a very straight forward and practical one; that the *Ratio* should be used by the episcopal conference to prepare national guidelines for the formation of permanent deacons.

The need to adapt the *Ratio* to national circumstances is obviated by a number of factors not the least of which is the actual situation of resources available within the many and varied places of the world in which the Church exists. The resources available to a diocese in Rwanda or Indonesia may vary greatly between each other and also dioceses in the USA and Germany. Secondly men to be formed as future deacons, unlike men being formed as future presbyters do not generally live in a seminary and may in fact live at a remote distance from a seminary or other house of formation or even theological college, where at least the academic formation could take place.

Even within a single country the resources available for the formation of deacons may vary quite considerably. Men living in Brisbane, Melbourne, Perth or Sydney have access to institutes for their theological formation that are not available to men in Wilcannia-Forbes, Broome or Cairns. How are episcopal conferences to support diocese within that conference to fulfil the needs for formation of deacons?

Formation is not an intellectual or academic activity only. The academic or intellectual formation (doctrinal dimension) for the sacred ministry is only one quarter of the total formation to be offered to presbyters and deacons. There are four elements to be considered in a formation program for sacred ministers; human, spiritual, doctrinal and pastoral (See Part IV of the *Ratio*). It needs to be recalled that the *Ratio* for deacons needs to be read in the light of *Pastores dabo vobis* on the formation of presbyters (21 references in all). The *Ratio* makes repeated connections between the formation of future deacons and of presbyters because the document completes the treatment on the formation of those called to the sacred ministry (Joint declaration par 2).

The *Ratio* allows episcopal conference to develop a formation program suited to the needs of local churches (dioceses) so that the formation of future presbyters and deacons will have a certain unity



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around the globe and also allow for a “complete and earnest” formation that is worthy of future ministers. The *Ratio* would rule out haphazard, under resourced or not fully planned and robust formation programs. There is an assumption that something of equivalence will exist between the formation and resources allocated to formation of future presbyters and future deacons. Obviously some things will be different between the formation of future presbyters and deacons that will necessitate some differences in resource allocation. The cost of maintaining and staffing a seminary will require a very different commitment of personnel and financial resources which will not be equivalent to a deacon formation program but they should not be so different that the formation of deacons is so under resourced, undervalued and under prepared that the formation is vastly inferior to that of other sacred ministers. The completeness and earnestness of the deacon formation program should be evident.

We have now covered how we know what national guidelines should include and not include because we know what the Holy See asks of local episcopal conferences: develop norms for formation. The local bishop needs to adapt these for his local circumstance in the diocesan norms for formation. So national and diocesan guidelines are all about formation in the four dimensions listed above.

What guidelines should not include?

As there is not anything else to include apart from information about formation in a national guidelines what not to include is anything that it not about formation. When I examined national and diocesan guidelines I found that sometimes the bulk of the guidelines are taken up with non-formation matters and in a few instances that is all that the guidelines cover. I won't mention the documents by name of nation or diocese here, but I do want to begin this section by listing a few things that should never, ever be in a national or diocesan guidelines for deacons and not just because they are not about formation but because they are wrong.

In this list, taken from some current diocesan and national guidelines I would exclude from any guidelines, all of which are wrong, include the following:

- That a deacon presiding at a Vigil service for a funeral should wear a suit and tie, in keeping with his status, (Alb and stole is the proper vesture indicated in the rite)
- Several pages outlining the qualifications required and procedures to apply to the bishop for the faculty to preach, (the faculty comes with ordination)
- Procedures and qualifications for a deacon to apply to be a catechist (a catechist is a lay ministry and all clergy may and should catechise)
- That deacons should be addressed as Rev Mr (this is an 18th century English anachronism and the common term then in use to refer to any Christian minister)



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- That a deacon can apply to a parish priest to be appointed by him to a parish ministry (only a bishop may appoint a deacon)
- To refer to his ministry as his employment and to use any term that suggests a sacred minister is in an employee-employer relationship with his bishop (sacred ministry is not employment)

I could go on listing things from guidelines that are definitely wrong and should never have a place in any document about deacons, but I think this list is sufficient to establish one important fact-most of these ones that are wrong have at their base an understanding of the deacon as a lay man and not a cleric.

It is not necessary to include in national guidelines any of the matters concerned with clergy life and ministry. Some of these matters include how a deacon will be appointed, remuneration for ministry and reimbursement for expenses incurred in ministry, the range of ministries to which a deacon may be appointed, or the preference for a deacon as leader of Sunday worship in the absence of a priest or as a parish pastoral leader where a bishop is truly unable to appoint a presbyter. Nor is it necessary to set out his rights and obligations as a minister in such guidelines. There are sundry other matters concerned with clergy life and ministry that need not be included in national and diocesan guidelines.

Why is it not necessary to set these out in such guidelines? They are not necessary because a deacon is a cleric and has the same rights and obligations as other clerics, with some derogation from the law which are indicated in the law. The Diaconate brings with it a series of rights and duties as foreseen by canons 273-283 of the *Code of Canon Law* with regard to clerics in general and deacons in particular (Directory 7).

There are a number of sources of law, the code of canon law being one of these. But there are also the liturgical books, papal documents, rulings and guidelines from various Roman dicasteries, the Directory and other sources.

The Directory for the Ministry and Life of Deacons (1998) developed by the Congregation for Clergy provides specific elaboration of the rights and obligations of deacons just as does the Directory for Clergy life and ministry of Presbyters. The Joint Declaration from the two dicasteries included in the *Ratio* and Directory makes the point abundantly clear that:

The *Directory for the Ministry and Life of Permanent Deacons*, as in the case of the *Directory on the Ministry and Life of Priests*, has, together with its hortative character, juridically binding force where its norms “recall disciplinary norms of the Code of Canon Law” or “determine with regard to the manner of applying universal laws of the Church, explicitate their doctrinal basis and inculcate or solicit their faithful observance”. In these specific cases, it is to be regarded as a formal, general, executory Decree (cf. canon 32).



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The Directory for the Ministry and Life of Deacons needs to be studied and implemented. There is no need for national or diocesan guidelines to consider any of these matters and invent novel solutions. The local church and its bishop have very few matters to determine with regard to the Ministry and Life of Deacons and these are listed in the Ratio and Directory. These matters are:

- After consulting with the local church to determine if the ministry of deacon is to be restored in the local church (*Ratio* 16),
- To implement that national Ratio adapted to the circumstances of the local church (*Ratio* 16)
- To make a determination if a particular trade union activity, membership of a political party, administration of finances and goods or employment is consistent with the sacred ministry of a deacon (Directory 12),
- To determine the length of time a deacon may absent himself from the diocese without permission (Directory 14),
- To determine how the local diocese will provide for the remuneration and upkeep of clergy , including deacons, establish funds for their upkeep, including health insurance and aged care (Directory 16)
- To determine how parishes and diocesan entities will reimburse clergy including deacons, for expenses incurred in ministry (Directory 20),
- To determine how to care for widows of deacons and obligations toward deacons who become unemployed from secular employment (Directory 20)
- To determine the required length of the annual retreat (Directory 56)
- To determine if deacons are to be obliged to wear clerical dress (can 288)
- As well as other matters particular law may determine for diocesan clergy

What should guidelines include?

Now that we know the national guidelines about formation of sacred ministers in the four dimensions; human, spiritual, doctrinal and pastoral, we can elaborate on what they should contain. First of all the episcopal conference is developing national norms for diocesan clergy only. In the Joint Introduction to the *Ratio* and Directory the two Congregations state that it is the task of the clerical religious orders that have permanent deacons to adapt the *Ratio* for their institutes.

Following the pattern of the *Ratio* the national guidelines should establish who, apart from the bishop, is to have responsibility for the formation of deacons. Sections 16, 18 and 19 provide a brief summary of the role of the diocesan bishop. The bishop has an obligation to personally know all the men in formation and to meet with them periodically and contribute to their formation. He is to be involved in discernment of vocations and eventual decision as to the suitability of a candidate for ordination. He needs to appoint a director of formation, who may be a priest or deacon (*Ratio* 21). He needs to approve a diocesan program of formation and provide the resources for this. One of his important tasks is to ensure that catechesis of the clergy and laity on the ministry and life of deacons

in the Church is provided, so that the whole Church can contribute to the formation of future deacons (*Ratio* 16).

National guidelines should indicate the content for formation in each of the four dimensions, how these are to be presented and what criteria are to be used to assess the suitability of candidates and adequate achievement of standards of formation.

If they do not have all of the resources available within their local community bishops may draw on resources of other diocese or communities of learning and formation, such as those that may be available online now days. The *Ratio* establishes the basic content of the formation in all four dimensions in Part IV. The section draws heavily on the parallel document on presbyteral formation and presents a formation program that is meant to be completed over not less than three years (*Ratio* 49) and which is more or less equivalent to that of future presbyters (*Ratio* 1), with suitable adaptations to the nature of the men being formed, their previous spiritual and theological formation, their future ministry and the time constraints of what must be part time formation for almost all potential deacons.

Young unmarried men who intended to become permanent deacon should be formed in a house of formation, which would likely be the seminary (*Ratio* 50). Such young men may be ordained at the age of no younger than 25 years and freely embrace celibacy.

It is worth pausing to dwell on the rationale provided for such complete formation. The *Ratio* and Directory repeatedly remind us that deacons participate in the one sacred apostolic ministry of the Bishop along with the presbyters of the diocese. As clergy or sacred ministers, the *Ratio* and Directory use both terms for deacons, presbyters and bishops, they collaborate in the same ministry exercised in different ways as ministers of grace for the building up the Church for mission (*Ratio* Introduction 1, 3 and Directory 37-39).

Therefore the formation of deacons needs to correspond to this task and suitably prepare men for the apostolic ministry.

The national guidelines should include indications of the stages of formation a man passes through on his way to potential ordination. The propaedeutic period, aspirancy and candidacy along with the prescribed times for receiving the instituted lay ministries of lector and acolyte (*Ratio* Part I section II). The various rites to be observed and the accompanying documentation, discernment process should be specified. It should be noted, that as with formation of men for the presbyterate, aspirancy and candidacy are not automatic paths to ordination, as no one has a right to ordination. The bishop must discern along with the candidate and his formators that a candidate is suitable for ordination and that decision rests entirely with the bishop. This fact highlights the need for the bishop to be as acquainted with the men in diaconal formation as he is with the men in presbyteral formation. If the candidate is married the bishop should also know his wife and be acquainted with his children.

Using the national guidelines for formation the local ordinary will develop his diocesan program. He will be responsible for the resources and funds required for the formation program just as he is with



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the presbyteral formation program. Obviously the funding will be less than that of potential presbyters because there is not the additional cost of a seminary. Whatever plans he has in place for paying the tuition costs and other costs associated with formation for potential presbyters will apply to potential deacons. Parishes and other entities should not pay for the formation of deacons unless it is the custom of the diocese that they also pay for the formation costs of presbyteral candidates.

National guidelines should be a national application of the *Ratio* and therefore should solely be concerned with formation of sacred ministers. That is all that the Holy See asks of episcopal conferences. It may be useful in a National guidelines document to set out in an appendix the other few things for which the Episcopal conference has to determine for clergy and deacons in particular. These are; which Hours of the Liturgy of the Hours a deacon must pray (Ratio 13, Directory 35), what constitutes clerical dress in the nation or region of the Episcopal conference (can 284), to communicate any norms regarding membership of trade unions and political parties (Directory 13) and norms for engagement with the television, other media and publications (Directory 26).

If the national guidelines have a character that suggests anything other than a focus on formation then they are not fulfilling the request of the Holy See to develop national norms for formation based on the Ratio 1998.

Conclusion

A national or diocesan guidelines document on deacons should only concern itself with initial and ongoing formation of deacons. There is neither a requirement nor need to include any other elements. The Holy See simply requests episcopal conferences to use the Ratio as a basis for developing a local version suited to the circumstances of the regions. Each diocese will then need to apply and adapt the national *Ratio* within the circumstances of their local church.

All matters relating to clergy life and ministry require application of the Directory, the Code of Canons and other sources which elaborate the rights and obligations of clergy. This is no different from what applies to presbyters. To acknowledge this simple fact would go some way toward a more complete reception of the Second Vatican Council and of the ministry of deacons in particular. There is in fact a risk, as we have seen with some of the more glaring errors highlighted above, that in attempting to create national and diocesan guidelines which parallel the Directory for the Life and Ministry of Deacons, we will obscure the ministry we are describing, which is simply part of the one apostolic ministry established by Christ. Instead we describe something that does not reflect a Catholic theology of Holy Orders and ministry in the life of the Church.

It will be interesting to see what our new national guidelines contain when they finally emerge. Will they be a national *ratio*? Will they have a focus on earnestness and completeness in the formation of permanent Deacons?

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