



UNIVERSITY of DUBUQUE
THEOLOGICAL SEMINARY

March 28, 2022

Brian K. Williams
Program Director, Religion
Lilly Endowment Inc.
2801 North Meridian Street
Post Office Box 88068
Indianapolis, IN 46208-0068

Dear Brian:

I am enclosing the report from the University of Dubuque for grant number 2018 0972 for the reporting period of 1/1/2021-12/31/2021.

All contact information remains the same for this reporting period.

Thank you for the opportunities this grant has allowed us. Pastors are thriving and we are developing rich partnerships.

Please feel free to contact me if you have any questions or need additional information from us.

Sincerely,

Rev. Dr. Karen Nelson

Rev. Dr. Karen Nelson
Lilly Grant Program Director
319-330-4911
knelson@dbq.edu

Enclosure



CLERGY COACHING IN COMMUNITY AND CONTEXT

Lilly Endowment
Thriving in Ministry Initiative
2020 Annual Program Report
Grant # 2018 0972
Reporting Period 01/01/21/-12/31/21

1. PROGRAM AIMS AND PURPOSES

Clergy Coaching in Community and Context contributes to building Christ's church by helping pastors thrive in the ministry settings, contributing to the development of 75-90 individual pastoral leaders and to the collective work of the University of Dubuque Theological Seminary (UDTS) in equipping women and men for pastoral leadership.

For each pastor participant, the expected outcome is a higher degree of thriving in ministry, as measured by the pastor's self-assessment and the assessment of their clergy coach and coaching community in four areas:

1. Meaningful relationships with other pastors that improve one's experience of pastoral ministry.
2. Demonstrated personal improvement in at least two ministry or leadership skill areas.
3. Sustained habits that contribute to thriving as a pastoral leader.
4. Articulated, theological-informed vision for one's pastoral leadership.

For UDTS, the expected outcome is a model of clergy coaching that has been tested and refined by three communities of pastoral leaders that are important to the ongoing work of the Seminary. Specifically, this includes:

1. Refining a replicable model for clergy coaching that can be sustained after the end of the grant periods.
2. Solidifying relationships with three constituencies that contribute to our future as a seminary:
 - The regional United Methodist Church, for which UDTS has been a major educator of pastors.
 - Recent UDTS graduates who are taking their education into the parish setting.
 - Madison-area missional practioners, who factor significantly in a required M.Div. course, "Gospel in Context."
3. Bringing what we learn from pastors "on the ground" into the curriculum so that UDTS can better equip future pastoral leaders.

2. GRANT ACTIVITIES

	<i>New Pastors</i>	<i>Missional Innovators</i>	<i>Mid-Career Pastors</i>
Leadership	<ul style="list-style-type: none"> • Lead: Rev. David Rohrer • 1 coach • 2 spiritual directors 	<ul style="list-style-type: none"> • Lead: Dr. Christopher James • 4 team coaches • 1 coach has also taken on some coordinator duties 	<ul style="list-style-type: none"> • Lead: Dr. Elmer Colyer • 1 clergy coach • 1 spiritual director
Key Activities	<ul style="list-style-type: none"> • Monthly online meetings with 2020 cohort participants (from January to June 2021) and 2021 cohort participants (from September to December 2021) • 2020 cohort continued to meet for monthly online meetings on its own without Rev. Rohrer • 65 individual meetings with coach or spiritual director • The retreat scheduled for August 2021 was canceled due to a surge in covid infections numbers 	<ul style="list-style-type: none"> • 2020-21 cohort concluded • 2021-2022 cohort recruited • 2021-2022 cohort launched • 8 cohort gatherings (in-person or Zoom, dwelling in Scripture, guest faculty, book discussion, discussion) • 2 two-day, daytime retreat (Fall) • 21 team coaching sessions (one coach, 3 fellows) • Alumni gatherings 	<ul style="list-style-type: none"> • Six day learning intensive • 139 individual clergy coaching sessions • 50 individual spiritual direction sessions • 10 group spiritual direction sessions • 52 months physical fitness coaching for 6 participants
Participating Clergy	<ul style="list-style-type: none"> • 2021 Cohort - 8 recent UDTS graduates – Five who are either serving PCUSA congregations or in the ordination process, three who are serving United Methodist parishes • Continuation of the 5 people who make up the 2020 cohort. The 2019 cohort conclude their commitment to the program in June of 2022 at the annual retreat. 	<ul style="list-style-type: none"> • 20/21 Cohort – 9 • 21/22 Cohort – 9 • Alumni from beta actively participating - 6 	<ul style="list-style-type: none"> • Twenty-one mid-career United Methodists pastors and one Presbyterian pastor in upper Mid-west
Resources	<ul style="list-style-type: none"> • Curriculum prepared by instructor • Zoom subscription connects members across the nation 	<ul style="list-style-type: none"> • Curriculum prepared by instructor • Facebook group • Zoom account • Books: <i>Joining God, Remaking Church, Changing the World; Church Planting in Post-Christian Soil; How (Not) to be Secular; Liturgy of the Ordinary</i> 	<ul style="list-style-type: none"> • Curriculum prepared by instructor • Work-well app from Matt Bloom • CAT Assessment • Breakthrough Prayer • DISC Behavior Style
Partners		<ul style="list-style-type: none"> • 11 guest faculty from various local churches and organizations Wisconsin 	<ul style="list-style-type: none"> • Dr. Matt Bloom – wellbeing assessment

		Council of Churches, Holy Wisdom Monestary, Urban League, Blackhawk Church <ul style="list-style-type: none"> • Collaboration Project of Madison (partners for alumni gatherings) • Upper House (partners for retreat and event space) 	<ul style="list-style-type: none"> • Dr. Rick DeShon – EM360 unit of UM General Board of Higher Education • Take Flight Learning • DiSC assessment • Holy Cow Consulting – Congregational • Sue Nilson Kibbey – Breakthrough prayer training
--	--	--	--

Activities:

While COVID-19 accommodations impacted activities during the second and third year of the grant, we were still able to engage in all of our major planned activities. The activities fall into four major areas:

1. Maintaining regular group interactions. Two of the three coaching groups held at least one large group meeting during the year. In most cases, these meetings were held using video conferencing technology, although the missional innovators have had some limited face-to-face contact, especially in groups of four. Based on comments made by participants in evaluative interviews, these gatherings are meeting the expectations of the participants. The primary value they affirm is in the mutual encouragement and support that is a product of these times and how that is assisting them in their transition. These meetings facilitate the formation of meaningful peer and mentor bonds, learning and engagement in sustaining spiritual practices.
2. Facilitating individual or small group coaching sessions. The one-on-one or small group sessions with a spiritual director or coach were crucial activities, especially for dealing with the isolation and the burden of responsibility of doing ministry during COVID-19. Participants reported that spiritual direction and clergy coaching provided a level of connection and support for engaging the challenges created by COVID-19 that has been indispensable to their effectiveness and resilience in ministry compared with other clergy they know who had no connection and support.
3. Connecting to ministries beyond those of grant participants. Participation in the grant is having a major positive impact upon pastors and congregations, and especially during turbulent months since the beginning of COVID-19 and all the political and cultural turmoil that has transpired as well. One pastor in this group saw his congregation experience significant growth in new membership generated, in part, by his participation in the grant. Also, because of the grant, we have begun conversations with other organizations and individuals interested in the kind of work we are doing.

4. Generating interest in the initiative. With two years completed, we now have a group of participants who can act as cheerleaders for the program. We are using what we have learned in the first two years to refine the recruitment process for future cohorts. This includes encouraging a more intentional discernment process for potential participants. The Mid-Career Pastors initiative launched a second cohort of twelve United Methodist pastors utilizing a discernment process and testimonials from the first Mid-Career cohort.

Participating clergy:

This grant has reaffirmed the need to meet clergy where they are. There are common elements to all pastors, but context also matters. Common to all the pastors we are working with is the tendency to be (or at least feel) overextended and isolated. The expectations of clergy and the hectic style and pace of life in American culture today is a recipe for pastoral depletion and burnout. The uptick of COVID-19 in the late summer and throughout the fall generated additional depletion and burnout and the clergy coaching, supportive relationships among peers in the cohorts played an essential role in helping pastors cope with the adversity and stress of ministry created by the prolonged pandemic. Consequently, flourishing in ministry and life is a challenge. In addition, our pastors suffer from scarcity of strong mentors and professional friendships. Participation in the cohort groups contributes to the mentorship and friendship.

We are finding that context makes a difference in what helps each pastor form, or re-form, a personal and pastoral imagination for ministry. Our work with the different groups has helped us to see that there are some advantages to more diverse groups.

- The new pastor cohort was designed to meet the needs of new pastors. The constituents are all recent M.Div. graduates of UDTS. They are living into several significant transitions, including a change in “audience” – moving from writing for professors to preaching to a congregation, a change in status – moving from being a peer among fellow learners to being a leader of a community, and a change in responsibility – moving from making use of resources provided by the seminary to assuming the responsibility of having to seek out new sources of support. A covenant peer support group is a very effective tool in helping the new pastor to live into this new place. Hearing the experience of one’s peers teaches two important lessons: they learn they are not alone and they hear about practical ways to navigate the transition. These monthly meetings are well attended and participants report that these times with their peers are very helpful to them.
- The missional entrepreneur cohort includes local pastors, church planters, ministry directors, non-profit leaders and discerners from across the denominational spectrum: ELCA, EPUSA, PCUSA, UMC, Non-denominational, Mennonite, Assemblies of God and more, mostly in the first 5 years of ministry. Some are still seeking clarity regarding their vocation, others (those rooted in congregations) are navigating questions of fit and the potential impact they can have in (often) small and struggling congregations. The new cohort is more racially diverse, including three African American men, and one Latina, as well as one new Latino coach. In addition to structured spiritual practices and learning, un-programmed time for conversation

(preferably around a meal) is priceless for forming relationships that exist outside of the programmed gatherings.

- The mid-career pastors, except for one, are from the United Methodist Church. There are elements of denominational polity which inhibit the development of deep professional relationships. Some of that strain is lessened because these pastors are from different annual conferences. For these pastors, the ability to receive directive coaching in a supporting environment has been especially valuable. The disruption created by COVID-19 fueled much higher levels of feeling overextended and isolated.

Resources:

The most significant resource we provide is human: experienced and engaged individuals with whom meaningful relationships can be formed. Each participant is assigned to a clergy coach and a spiritual director. All are engaging in ongoing coaching relationships and many are taking advantage of individual spiritual direction.

Technologies, such as Zoom, Facebook, Skype, Moodle and web sites, have proved to be important resources for staying connected. For some participants, this has required learning new skills, but all have adapted to the technology that keeps them connected.

A variety of research tools and assessments such as EM360, Congregational Assessment Tool (CAT), Matt Bloom's Well Being Assessment, DISC Inventory and Strength Finder provide coaches with information to assist participants in their growth and flourishing as pastors.

In addition to the "human resources" of our paid staff, uncompensated local guest faculty are a major resource to the Missional Innovators (Missio Madison) program. In 2021, eleven guest faculty from various local churches & organizations provided their expertise and insight to the group. Guest faculty in 2021 included the Executive Director of the Wisconsin Council of Churches, sisters from Holy Wisdom Monastery, the CEO of Urban League Madison, the pastor of multicultural ministry at the largest church in Madison, lead pastors from Madison's two most prominent African American churches, a senior staff member of InterVarsity, a faculty member in social innovation at a local college, and Wisconsin Journalism Hall of Fame reporter. These encounters have provided fellows not only with insight, but also provide entry into ongoing connections.

Spaces for gathering are an important resource for the Missional Innovators (Missio Madison) cohort and, given that UDTS does not own property in Madison has led to a great partnership with Upper House in the use of two of their properties. Identifying picnic shelters, public spaces, restaurants and host churches suitable for 4-hour cohort gatherings across the city has been both a challenge and a good way to practice the "context as curriculum" value of the program. Only one space has been rented at market-rate cost—Holy Wisdom Monastery—and this one afforded an opportunity to explore this important hub for the regional ecclesial ecology, and came with it an hour with three of the sisters as guest faculty (at no additional cost).

We have gifted authors as our cohort leaders. Their books have been valuable resources and have contributed to building credibility and trust between the leaders and participants.

How to Read Thomas F. Torrance, by Elmer Colyer

The Trinitarian Dimension of John Wesley's Theology, by Elmer Colyer

Church Planting in Post-Christian Soil, by Christopher James

The Sacred Wilderness of Pastoral Ministry, by David Rohrer

Leadership:

A theme that appears throughout this update – context matters – is a learning that has been reinforced for the three program leaders. The three-pronged application of our grant provides a platform from which to clarify the fundamental elements of coaching for pastoral flourishing as well as to discern the unique challenges present when coaching is contextualized. This will strengthen our clergy coaching model as we refine it in the coming years.

One of the unanticipated learnings has been the depth of leadership present among the program participants. New leaders are emerging from the cohort groups. The New Ministry cohort has created opportunities for participants to initiate resources. The Missional Innovator cohort has restructured to elevate two participants to the role of “apprentices” who function somewhere between participants and team coaches. Members of the Mid-Career have been helpful in providing experienced-based leadership on working in the congregational setting. The emergence of these new leaders has caused us to rethink some elements of the program. Creating a greater role for participants to lead will factor into the ways we sustain these initiatives after the grant has ended.

Partners:

Several partners are emerging as we establish our three clergy coaching groups.

The Missional Innovator initiative (Missio Madison) is partnered with Collaboration Project, a non-profit bringing churches together around serving the community; the Executive Director served as a coach for the Spring 2020 and 2020-21 cohorts. They are also partnered with Upper House, a Christian study center on the campus of University of Wisconsin, Madison, and the Wisconsin Council of Churches. All three organizations helped to promote the initiative and encourage applicants to apply. Upper House provided space for gatherings at no cost and made their retreat property available at far below market rate.

The leaders of the Mid-Career cohort launched a second cohort of twelve United Methodist Pastors. The new cohort pastored utilized Dr. Matt Bloom’s Well Being assessment and app and most introduced the assessment and app to laity of their congregations served. The 2021 cohort also utilized the DiSC behavioral style assessment and were trained in how to utilize with with the leadership and laity in their congregations. A growing number Mid-career pastors in the 2018 and 2021 cohorts and their congregations utilized the Congregational Assessment Tool provided by Holy Cow Consulting. They are also partnering with Dr. Rick DeShon and the EM360 Unit in

the United Methodist General Board of Higher Education and Ministry to use the EM360 assessment with the new 2021 Cohort of pastors.

3. REFLECTION

COVID-19 Response:

The major impact of the pandemic was moving most activities from a face-to-face to an online format. Each cohort needed to respond in slightly different ways.

- For the new pastor cohort, the geographic distance of the participants meant that most of activities were already scheduled to be held on line. Monthly cohort meetings and one-on-one coaching/spiritual direction sessions happened as they would have if there had been no pandemic. Once again in 2021 the only “in-person” element of the new pastors cohort had to be canceled. With this cancellation due to rising COVID-19 infection numbers we also chose not to schedule an online retreat for the entire group. We simply gathered the new members of the 2021 cohort online to introduce them to the spiritual directors and coaches and to facilitate a “get to know you” time.
- For the missional innovator cohort, the move to Zoom complicated some of the standard practices for engaging with neighbors. However, because everyone was located within one county, there were opportunities during the warmer months for connecting with neighbors on sidewalks and front yards.
- For the mid-career pastors cohort, many of the activities crucial to the grant program were already entirely online in Moodle, UDTS’s distance education platform. The same was true of all the spiritual direction and clergy coaching which was also almost entirely digital via phone conversations or Zoom sessions.
- Nearly all of the churches served by the 2018 and 2021 Mid-Career pastor cohorts remaining financially healthy and most also had increases in financial giving despite all of the financial challenges created by COVID-19. One pastor and congregation experienced dramatic growth in worship attendance, membership, and financial giving for a second year in a row. Nearly all the pastors/congregations in both cohorts of the Mid-Career group improved their technological ability to produce high quality streaming worship or recording it and moving it to a digital delivery experienced a significant increase in online viewership, including one church whose substantive online participation in worship grew from several hundred to several thousand, including viewers. The pastors and churches without the technology to move worship and other a variety of countries in other parts of the world. Several pastors and congregations in both Mid-Career cohorts found Breakthrough prayer practices learned from Sue Nilson Kibbey’s online training to be especially helpful in maintaining and building community despite the disruptive character of COVID-19. The new 2021 cohort was able to hold their May Intensive in person by housing the entire cohort in a bed and breakfast in

Dubuque and everyone either vaccinated or tested for COVID-19. For most of the pastors the May Intensive was the first time in over a year that they had been together in person with peers in ministry. The level of energy, deep community, and joy among twelve pastors, and three leaders many of whom had never met was astonishing and transformative, as is evident in their accounts of the impact of the May Intensive on their lives and ministries.

Stories:

- One of the greatest benefits of the new pastors cohort that has emerged within the 2021 group is the way in which the group provides such significant support in the matter of coping with the stressed ecclesiastical leadership structures with which they must deal. This is true for both United Methodist and PCUSA participants. Several of the members of the group are serving congregations and yet still in various stages of the preparation process for ordination with their conferences or presbyteries. These certification and ordination processes are proving to be somewhat antiquated, irrelevant in light of current realities in congregations and perhaps even abusive for many people in the cohort. The governing bodies are needing the service of these cohort members to pastor part time and multiple point parishes yet the process of officially recognizing and affirming their work as pastors is slower than usual and often unjustly delayed. In some ways the support the groups provides is simply the encouragement that comes with shared experience (i.e. misery loves company”). But more than that, the members of the cohort are, because of empathy for each other, helpful to one another in encouraging one another to persevere.
- One of the alumni of the Spring 2020 Missio Madison beta cohort has taken a position with the Wisconsin Council of Churches as “Curator of Content and Ecumenical Innovation Coordinator,” a position from which she is now a leader of ecumenical efforts.
- A non-denominational church plant led by one alumni of the Spring 2020 beta cohort has moved into and begun sharing space with an ELCA congregation with a large and underutilized building pastored by another alumni of the Spring 2020 beta cohort.
- While recruitment for the first two cohorts of Missio Madison required significant proactive invitations and these cohorts were overwhelmingly Anglo (6 of 6 for Spring 2020, 7 of 9 for 2020-21), multiple applications for the 2021-22 cohort came in unsolicited and the launched cohort included three African American men and a Latina (4 of 9). This recruitment success is in significant part the result of the efforts of an influential Korean-American alumni from the second cohort and the hiring of an influential Latino pastor as a coach for the newest cohort.
- Quote from a participant in the first 8-month cohort of Missio Madison: “I developed more comfort with taking risks around discovering what God's already doing in our community. And I am more confident of my call to join God in the neighborhood. I'm also encouraged by the movement of the Spirit so clearly evident amongst those in our cohort from diverse denominations.”

- One of the pastors in the mid-career 2021 cohort noted that she had five to eight years left in ministry and longed to see her congregation flourish. She entered this DMin to find new direction and inspiration. In her words, “Instead, what I found was the vital need to return to where I started, with God and the community of Christ in the Holy Spirit, breathing the air of Trinitarian respiration to break through the stifled air of the administrative role to which I had defaulted. I leave this week’s intensive renewed and equipped with new tools that will keep me anchored to the love God is. And the anchor that is secured by the very tools and habits I avoided, will provide the freedom to love fully and openly once again.”
- Another pastor in the mid-career cohort his experience of the isolation and loneliness that characterized the pandemic and noted that the May Intensive “was like a cold drink of water on a hot day to spend a week in community with leaders who love God and love one another. To laugh and to cry together, to mourn the losses of the past year and look forward with hope to the coming year was a pure gift that not only reinforced the objectives of the DMin, but restored my soul.”
- Still another pastor in the 2021 cohort had this to say about the May Intensive: “What this D.Min. means for me cannot be explained in a paragraph or two. I can only say it has given me new life in ministry and for the first time in many years hope for the future of ministry for pastors within the United Methodist Church. The intensive was a time to learn and bond with the others in the cohort as well as with [the leaders]. I have never felt as close to a group of people so quickly, let alone with a group of pastors, as with these incredible people assembled in the cohort and [those who] lead it. I believe with all my heart that what your vision for this program is, is just what pastors such as myself have longed.”
- One pastor in the new 2021 mid-career cohort recommended the program to a friend who is the lead pastor of a large United Methodist congregation in Kentucky. He joked that after researching several programs, “this program chose me. The approach of this DMin is different and needed, integrating spiritual direction, coaching, and academic disciplines. It is rigorous and holistic. And it’s focus on clergy and congregational flourishing is exactly the right approach in a time of such languishing.”
- One final narrative from a pastor in the mid-career cohort: “Many of my family, friends, and colleagues could not believe I would sign up to be a part of DMin program while we are still emerging from the pandemic. So many of my colleagues have been languishing because of the challenges of ministry in general and COVID in particular. This program’s goal of helping clergy to flourish in ministry and life so that they can eventually lead congregations and communities to do the same couldn’t be more relevant to present realities. Each of the books we have read and papers we have contributed to my flourishing as I attend to my relationship with God, physical health and wellbeing, create and live out a practical theology of work and leisure, engage my social life, create a plan for continue growth, and constant reevaluation of my routines. However, the week-long intensive we just completed took everything to an entirely different level. Not only was the teaching great, but the opportunity to live in deep and authentic Christian community

was powerful. After one week I already feel deeply connected with bonds of fellowship with the cohort and even more deeply connected to God. The presence of God was palpable. We lived everything we've been reading about. My wife said I came home an entirely different person, teeming with life and a joy that could only come from being in the presence of God. What we are both learning and living in this cohort can and will transform each of us and the church.”

Accomplishments:

The second year has been complicated and challenging due to COVID-19. As a result, there has been a mixture of success and challenges in the expected outcomes.

- Whether you call it confirming a sense of call, finding one's voice in ministry or beginning to develop a pastoral imagination, the members of the new pastor cohort are all engaged in growing in this awareness. Like the members of the 2019 and 2020 cohorts, the 2021 participants are sharing their discoveries and struggles with one another and encouraging one another as they grow into their pastoral identities.
- Among our new pastor cohorts what continues to be affirmed is that being a part of a covenant peer support group of friends in ministry is a valuable resource. The 2021 cohort members, like the 2019 and 2020 cohort members, all affirm that this aspect of the Pastor as Disciple initiative is what attracted them to the program and is also providing an important piece of the support they need to sustain their work in ministry.
- High-functioning cohorts of pastors. Spiritual direction and clergy coaching proved invaluable for pastors in the mid-career cohort who noted dramatic differences in their responses to COVID-19 compared with pastors they who did not have a coach or spiritual director. Those same pastors in the mid-career cohort, however, did not remain closely connected to one another.
- Affirming individual participants' sense of call is core to what we are doing. Some of our new pastors shared that they are discovering a difference between who they thought they were going to be in ministry and who they are.
- Creating a group identity. The presence of peer support was a key felt need when the participants signed up for the program and they report that this need is being met.
- Developing partnerships with like-minded organizations. The collaborating with Dr. Matt Bloom has grown beyond the mid-career pastors cohort and is impacting the seminary and the university. Bloom visited campus and met not only with seminary faculty and administrators, but also with Head of the Nursing Department. Additional university faculty in the Physician's Assistant Program are also eager to connect with Bloom and learn about helping their students learn the knowledge and skills that contribute to flourishing in helping professions. Collaboration with Sue Nilson Kibbey have also moved beyond providing training for Breakthrough prayer initiatives for pastors and congregations in the

new 2021 DMin cohort into doing consultations with pastors around various dimensions of her work in the Missional Church Consultation Initiative.

- UDTS continues to hone its clergy coaching model and utilize clergy coaching in new venues beyond the three cohorts in the Lilly initiative, including seminary students and pastors.
- UDTS plans to incorporate the assessments used in the mid-career cohort into other degree programs. UDTS is developing a new model of theological education that incorporates into the curricula of its degree programs an assessment and competence-based dimension, along coaching to improve student actionability.
- UDTS is moving forward to create a broader conversation with various collaborators around how to integrate the assessments and develop a more holistic approach to their use in theological education.
- Creating conversations about the impact of this model on future ways of doing theological education. As we consider the role for seminaries in the future of the church, we are encouraged by the enthusiasm these cohorts are generating. We are looking for ways to embed the best of these cohorts into the degree programs at UDTS.
- Our Madison cohorts have become key hubs for ecumenical friendship and collaboration in the city, linking not only individual pastors but several other hubs and initiatives. Partnerships formed and cultivated through Missio Madison led four partner organizations (Wisconsin Council of Churches, Upper House, Collaboration Project, and University of Dubuque Theological Seminary) to successfully apply for a “Thriving Congregations” grant (“Awaken Madison”).

Lessons:

1. Deep life-giving relationships among ministry peers is crucial to flourishing in ministry and life. The experience of the mid-career in-person May Intensive for the new 2021 mid-career cohort and their narratives about it deeply reinforces one of the crucial clergy coaching in community emphasis of this Lilly Initiative. Bloom’s research helps explain why this is so important. Ministry often isolated pastors and doubly so during COVID-19. The pastors in both mid-career cohorts recount how transformative relationships of unconditional positive regard, openness, and trust are to clergy flourishing.
2. Clergy coaching and spiritual direction play a crucial role in clergy ministry effectiveness and clergy flourishing in ministry. Pastors in the mid-career consistently point to having the support and accountability of a coach and spiritual director as pivotal to wise leadership, ministry effectiveness, and flourishing. One of the pastors in the 2021 mid-career cohort noted, “As much as I felt like I didn’t have time for anything, I was amazed by the difference it made even to fill out the coaching form. Many, many times over the course of 2021, I felt like there were 75 things going on in my life, none of them related

to the other, but with [my coach's] well-placed questions and giving me room to talk, I began to integrate the various things happening and, as a result, my leadership capacity grew. And, more than once last year, as I have wondered how long it would take people to realize that I'm basically full of sh** and not actually gifted or maybe even called to this work, [my coach] would smell that in the wind and look right at me and say, "You are a great leader and a great pastor. Don't doubt that!" Oddly, I would believe him, move past the excuses masquerading as doubts, and get back at it."

3. Pastoral ministry at this moment in history is incredibly difficult, much more so than even 10 years ago. Seminary professors who are involved in clergy coaching have an ongoing window into the difficult and at times messy ministries and lives of pastors. While invaluable to pastors, we are learning that coaching is invaluable to professors as well since they bring that knowledge of ministry reality into their reflection on theological education and their teaching.
4. There is interest in theological education, broadly conceived. Pastors desire the skills to meet the ever-changing demands of their call. Participants aren't necessarily looking for a degree, but they do want theologically grounded formation provided by qualified leaders in a supportive community setting.
5. Flourishing in one area of life can lead to flourishing in other areas. We have noticed among several of the participants that this intentionality around flourishing can be contagious and deeply influence other areas of a pastor's life and ministry. This impact is extending to laity in the congregation who observe the modeling of these characteristics in their pastor.
6. Maintaining meaningful professional relationships is hard work. Despite the awareness that close relationships with peers contributed significantly to flourishing in ministry, those close relations were among the first things dropped at the beginning of the pandemic. We plan to reconnect the pastors after COVID-19, rebuild those relationships, and discuss practices to maintain those relationships after the cohort experience has ended.

Modifications:

Overall, we believe that the program, as originally conceived, is working well. Most of our modifications this year related to the need to respond to the impact of the pandemic on the format of our programming and the priorities of the participants' ministry. We originally allocated more money to travel costs and are finding more cost-effective ways to bring the cohorts together. Also, we underestimated the value and cost of commercially available assessment instruments. As we rebalance our spending to reflect these changes, we are also considering ways to factor this into sustainable models.

We are learning that the impact of COVID-19 along with challenges and problems of the current moment in history complicate theological education and the perfecting of the Clergy Coaching in

Community and Context program. We are hoping to launch an additional iteration of the program in 2024 after the current Lilly funding has concluded.

4. EVALUATION

Evaluation Strategy:

While our primary summative evaluation will take place at the end of the program, throughout this report are examples of the formative evaluations being done throughout the year. Each of three leaders informally evaluates their cohort throughout the year and, once per year, the grant leadership team meets to discuss what is working and what needs changing. That meeting serves as the basis for the content of this report.

Missional Innovators (Missio Madison) 2020-21 Cohort Evaluation Survey

The 2020-21 cohort took place entirely during difficult pandemic months and we heard regularly about the challenges and fatigue fellows encountered. Despite these realities, they reported some positive growth in factors related to thriving in ministry. Based on surveys using a 5-point Likert scale that were completed by fellows before and after their 2020-21 Missio Madison cohort experience (without reference to their previous responses):

- 5 of 9 fellows indicated improvement in the “quality of your current relationships with peers in ministry.”
- 6 of 9 indicated improvement in the “quality of your current relationships with mentors in ministry.”
- 3 of 9 indicated improvements in response to “How would you rate your current spiritual vitality?”
- 3 of 9 indicated improvements in response to “How is your ministry is going currently?”
- All nine fellows reported improvements in at least one of these four areas closely linked to thriving in ministry. Seven of nine indicated improvements in two or more areas.

These signs of positive impact toward thriving in ministry would be worthy of celebration during any 8-month period, but are especially significant given that this growth occurred despite the severe pressures and prolonged stresses of the pandemic.

Communication Strategy:

A report on grant activities is a regular agenda item on the monthly Seminary faculty meeting. The University Board of Trustees receives regular updates on the grant. As part of the grant activities, each of the three cohort leaders provides update to partners, including denominational agencies in the Presbyterian and United Methodist Church, researchers at other institutions working on clergy coaching, and community partners in the Madison, Wisconsin, community.

5. NEXT STEPS

	<i>New Pastors</i>	<i>Missional Innovators</i>	<i>Mid-Career Pastors</i>
January 2022 - December 2022	<ul style="list-style-type: none"> Recruit for next cohort from 2022 UDTS graduating class June retreat in Madison, WI for the members of all cohorts 2019, 2020, 2021 and 2022 24 online covenant group meetings: 2020- 10 group led sessions, 2021 – 6 mentored sessions and 4 group led session, 2022 - 4 mentored sessions 50-60 individual meetings with coach or spiritual director 	<ul style="list-style-type: none"> Complete 2021-22 cohort Advance ongoing conversations about partnership with Collaboration Project about a sustainable alumni community Recruit for and launch 2022-23 cohort with emphasis on recruiting Director-level church staff Confirm, contract and train (3) coaches for 2022-23 cohort 	<ul style="list-style-type: none"> Year 4 eight-day May DMin Intensive Evaluate and revise DMin curriculum Integrate the assessments to create a blended curriculum/competency DMin Incorporate a thriving congregation dimension into revised 2021 DMin Expand the use of Bloom’s Well Being assessment with laity Use EM360 assessment with 2021 cohort Use CAT assessment with 2021 cohort Lead reunion retreat to reconnect pastors in 2018 cohort Pursue using Filene Research Institute’s Financial Wellbeing Assessment with 2021 DMin Cohort Recruit pastors from initial DMin cohort to lead additional cohorts

While the three grant leaders are focusing their efforts on the implementation of the grant, they are working with the leadership of the Seminary to identify ways to keep the clergy coaching initiative going after the end of the grant period. Dr. Annette Borland Huizenga, Dean of the Seminary, and Dr. Mark Ward, Vice President for Academic Affairs, have been facilitating conversation with the grant leaders around next steps. Currently, those conversations are centered around three areas:

- Identifying and developing partnerships with organizations such as Upper House and individuals such as Matt Bloom.
- Embedding elements of the clergy coaching model into existing academic programs.
- Developing new, most likely non-degree, forms of theological formation.

THRIVING IN MINISTRY INITIATIVE BASELINE DATA GUIDELINES

A. Name of Organization: University of Dubuque Theological Seminary

B. Clergy Cohorts	2021	Total to Date
Number of cohorts begun by your project	1 (NP) 1 (MI) 1 (MC)	8
Number of pastoral participants in cohorts	8(NP)* 18 (MI)* 22 (MC)*	102
Number of congregations represented in cohorts	17 (NP) 17 (MI)* 25 (MC)*	113

C. Other Learning/Training Events		
Number of events conducted by your project	15 (NP)* 19 (MI)* 5 (MC)*	87
Number of pastoral participants in all events	19(NP) 13 (MI)* 19 (MC)*	303
Number of congregations represented in all events	17(NP)* 13 (MI)* 20 (MC)*	156

* NP = New Pastors MI = Missional Innovators MC = Mid-Career Pastors

D. Interesting statistics or trends of note.

We are tracking anecdotal reports of the amount of participant connection outside of scheduled programs to see there is any impact on the overall number and quality of relationships. In addition, we are asking for feedback on general measures of flourishing. We are interested in the “spill over” effects of improved flourishing in one area of life on flourishing in other areas.

E. Major gatherings or significant events for the coming year.

Date	Event and Description	Location
(NP)* Monthly (10) Feb. -May June 14-17	Web-conference Conversations w/ new recruits Retreat	On Line/Zoom Phone and on line Holy Wisdom Monastery in Middleton, WI

(MI)* Summer 2022 9/2021-4/2022 Sept.-Dec.2022 October 2022	Monthly alumni gathering Possible retreat in partnership with Collaboration Project Monthly Cohort 4 gatherings Monthly team coaching sessions October two-day retreat	Madison, WI Madison, WI Madison, WI Madison, WI Madison, WI
(MC)* January 19 April 14 May 22-28 May 30-Jn Ongoing June 3-4 June 8-9 June 10-11 June 12-13	Breakthrough Prayer Year 2 Kibbey ZOOM meeting of 2021 cohort Cohort Intensive Reunion Retreat 2018 cohort ZOOM meeting with groups of 4 Dr. Colyer- Iowa UM Conference Dr. Colyer- N. IL UM Conference Dr. Colyer – Great Rivers UM Dr. Colyer – WI UM Conference	Zoom Zoom Dubuque, IA Dubuque, IA Zoom Des Moines, IA Schaumburg, IL Peoria, IL Green Bay, WI

* NP = New Pastors

MI = Missional Innovators

MC = Mid-Career Pastors

University of Dubuque

Budget

Grant No. 2018 0972

	Total Grant Budget	Expenditures		Grant Balance
		For Period 01/01/21-12/31/2021	Grant Cumulative	
PERSONNEL				
Administrator Salary	\$ 240,456.00	\$ 53,045.04	129,545.06	\$ 110,910.94
Fringe	66,364.00	13,261.00	29,312.65	37,051.35
Coach Salary, New Pastors	66,364.00	13,260.96	38,635.96	27,728.04
Coach Salary, Missional Innovators	66,364.00	13,261.00	38,636.00	27,728.00
Coach Salary, Mid-Career	26,581.00	1,206.00	26,581.00	0.00
	466,129.00	94,034.00	262,710.67	203,418.33
ADMINISTRATIVE COSTS				
Supplies	2,500.00	165.34	761.59	1,738.41
Printing	2,250.00			2,250.00
	4,750.00	165.34	761.59	3,988.41
PARTICIPANT TRAVEL TO DUBUQUE				
New Pastors Cohort Travel/Lodging/Meals	92,000.00	0.00	3,093.82	88,906.18
Missional Innovators Cohort Travel/Lodging/Meals	38,165.00	2,697.96	5,047.38	33,117.62
Mid-Career Cohort Travel/Lodging/Meals	55,065.00	7,897.92	19,091.17	35,973.83
April Retreat Refreshments	5,280.00	0.00	249.00	5,031.00
	190,510.00	10,595.88	27,481.37	163,028.63
COACHING SESSIONS				
New Pastors Cohort Coach Travel/Meals	22,500.00	0.00	3,778.56	18,721.44
Missional Innovators Cohort Coach Travel/Meals	11,426.00	10.77	2,939.96	8,486.04
Mid-Career Cohort Coach Travel/Meals	24,310.00	2,850.46	6,444.04	17,865.96
	58,236.00	2,861.23	13,162.56	45,073.44
SKILL DEVELOPMENT RESOURCES				
Assessment Tests	5,720.00	520.00	1,520.00	4,200.00
Books and Videos	2,250.00	239.79	471.29	1,778.71
Focused Consulting	155,517.00	21,560.96	36,533.91	118,983.09
	163,487.00	22,320.75	38,525.20	124,961.80
Sub-Total Expense	883,112.00	129,977.20	342,641.39	540,470.61
Indirect Costs	52,990.00	2,411.99	4,353.13	48,636.87
TOTAL EXPENSES	\$ 936,102.00	\$ 132,389.19	\$ 346,994.52	\$ 589,107.48
CASH SUMMARY				
Total Grant Payments Received	\$ 936,102.00			
Cumulative Grant Expense				-346,994.52
Cash Balance	\$ 589,107.48			

Rev Dr Karen Nelson

Rev. Dr. Karen Nelson
Project Director

James Steiner

James Steiner
Vice President for Finance