



UNIVERSITY of DUBUQUE  
THEOLOGICAL SEMINARY

Rev. Dr. Karen Nelson  
Lilly Grant Program Director

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

Dear Brian K. Williams:

I am enclosing the report from the University of Dubuque for grant number 2018 0972 for the reporting period of 1/1/2022-12/31/2022.

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

Enclosure



## CLERGY COACHING IN COMMUNITY AND CONTEXT

Lilly Endowment  
Thriving in Ministry Initiative  
2020 Annual Program Report  
Grant # 2018 0972  
Reporting Period 01/01/22-12/31/22

### 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"> <li>• Lead: Rev. David Rohrer</li> <li>• 1 coach</li> <li>• 2 spiritual directors</li> </ul>	<ul style="list-style-type: none"> <li>• Lead: Dr. Christopher James</li> <li>• 4 team coaches</li> <li>• 1 coach has also taken on some coordinator duties</li> </ul>	<ul style="list-style-type: none"> <li>• Lead: Dr. Elmer Colyer</li> <li>• 1 clergy coach</li> <li>• 1 spiritual director</li> </ul>
Key Activities	<ul style="list-style-type: none"> <li>• Monthly online meetings with 2021 cohort participants (from January to June 2022) and 2021 cohort participants (from September to December 2021)</li> <li>• 2020, and 2021 cohorts continued to meet for monthly online meetings on their own without Rev. Rohrer</li> <li>• 70 individual meetings with coach or spiritual director</li> <li>• We held a retreat open to members of all four cohorts (2019-2022) at Holy Wisdom Monastery in Middleton, WI in June of 2022. 17 pastors and three leaders in attendance</li> </ul>	<ul style="list-style-type: none"> <li>• 2020-21 cohort concluded</li> <li>• 2021-2022 cohort recruited</li> <li>• 2021-2022 cohort launched</li> <li>• 8 cohort gatherings (in-person or Zoom, dwelling in Scripture, guest faculty, book discussion, discussion)</li> <li>• 2 two-day, daytime retreat (Fall)</li> <li>• 21 team coaching sessions (one coach, 3 fellows)</li> <li>• Alumni gatherings</li> </ul>	<ul style="list-style-type: none"> <li>• Six day learning intensive</li> <li>• 136 individual clergy coaching sessions</li> <li>• 81 individual spiritual direction sessions</li> <li>• 12 group spiritual direction sessions</li> <li>• 62 months physical fitness coaching for 7 participants</li> </ul>
Participating Clergy	<ul style="list-style-type: none"> <li>• 2022 Cohort – 7 recent M.Div graduates of UDTS – Five who are either serving PCUSA congregations or in the ordination process, two who are serving United Methodist parishes</li> <li>• Continuation of the monthly meetings of the 5 people who make up the 2020 cohort and the 8 people who make up the 2021 cohort. ogram in June of 2022 at the annual retreat.</li> </ul>	<ul style="list-style-type: none"> <li>• 20/21 Cohort – 9</li> <li>• 21/22 Cohort – 9</li> <li>• Alumni from beta actively participating - 6</li> </ul>	<ul style="list-style-type: none"> <li>• Twenty-one mid-career United Methodists pastors and one Presbyterian pastor in upper Mid-west</li> </ul>
Resources	<ul style="list-style-type: none"> <li>• Curriculum prepared by instructor</li> <li>• Zoom subscription connects members across the nation</li> </ul>	<ul style="list-style-type: none"> <li>• Curriculum prepared by instructor</li> <li>• Facebook group</li> <li>• Zoom account</li> <li>• Books: <i>Joining God, Remaking Church, Changing the World;</i></li> </ul>	<ul style="list-style-type: none"> <li>• Curriculum prepared by instructor</li> <li>• Work-well app from Matt Bloom</li> <li>• CAT Assessment</li> <li>• Breakthrough Prayer</li> <li>• DISC Behavior Style</li> </ul>

	<ul style="list-style-type: none"> <li>• Holy Wisdom Monastery Retreat Center in Middleton WI</li> </ul>	<i>Church Planting in Post-Christian Soil; How (Not) to be Secular; Liturgy of the Ordinary</i>	
Partners		<ul style="list-style-type: none"> <li>• 11 guest faculty from various local churches and organizations Wisconsin Council of Churches, Holy Wisdom Monastery, Urban League, Blackhawk Church</li> <li>• Collaboration Project of Madison (partners for alumni gatherings)</li> <li>• Upper House (partners for retreat and event space)</li> </ul>	<ul style="list-style-type: none"> <li>• Dr. Matt Bloom – wellbeing assessment</li> <li>• Dr. Rick DeShon – EM360 unit of UM General Board of Higher Education</li> <li>• <b>Take Flight Learning</b></li> <li>• DiSC assessment</li> <li>• Holy Cow Consulting – Congregational Sue Nilson Kibbey – Breakthrough prayer training</li> </ul>

**Activities:**

With COVID-19 restrictions lifted, each of the three cohorts were still able to engage in all of our major planned activities in person. The activities fall into four major areas:

1. Maintaining regular group interactions. Each of the three coaching groups held at least one large group meeting during the year. As in previous years, these gatherings are meeting the expectations of the participants. Participants affirm the value of these gatherings in providing mutual encouragement and support. These meetings have been valuable for solidifying meaningful peer and mentor bonds and contribute to learning and engagement in spiritual practices.
2. Facilitating individual or small group coaching sessions. The one-on-one or small group sessions with a spiritual director or coach continue to be crucial activities. Participants state that spiritual direction and clergy coaching provided a level of connection and support for engaging the challenges of ministry 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 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 since.
4. Generating interest in the initiative. With three 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.

### *Participating clergy:*

This grant has reaffirmed the need to meet clergy where they are. 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. 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 continue to find 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 Innovators cohort in 2022 included representatives from multiple denominations and traditions, including ELCA, Converge, UCC, PC(USA), EFCA, AOG, Wesleyan, and several varieties of nondenominational. Five of 18 fellows in the included cohorts are people of color. Many serve in pastoral or director roles at churches, while others work for local non-profits. Several members of the Missional Innovators cohort have since assumed significant positions in the Madison ecclesial ecology. These include a pastor of a small United Methodist church who is now Curator of Content and Ecumenical Innovation Coordinator for the Wisconsin Council of Churches, and two participants who stepped into staff roles with our partner Collaboration Project. Other fellows have remained engaged in church leadership while also taking significant civic roles, including appointments as Madison Public Schools Director of the Youth Re-engagement and as Executive Director of the Madison Northside Planning Council.
- The Mid-Career pastors, except for one, are from the United Methodist Church. The UMC is embroiled in the most significant internal conflict leading to the disaffiliation of thousands of UM pastors and congregations across North America. The conflict

and uncertain has fueled much higher levels of feeling stress, anxiety, and malaise. It was a difficult year from most of the pastors in the Mid-Career pastor, but the web of supportive created by connection with the other pastors in the cohort, clergy coaching, and spiritual has made a significant difference. The cohort pastors universally recognize that they are a much better place compared with their peers in ministry without network of support. In addition, the advice and wisdom provided by directive coaching has been invaluable in dealing with the conflict and misinformation in the UMC.

### ***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. The CAT assessment has proven to be one of the most helpful resources for Mid-Career UM pastors and their congregations for charting through course through the conflict in the UMC this past year, especially for pastors and congregations divided over whether to remain UM or disaffiliate.

The three-question framework for Missio Madison (Where are we? What is God up to? How is the Spirit inviting us to join?) has proven so effective that leaders involved in other local programs are moving toward adopting it.

### ***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.

It has become clear to the leaders of the Mid-Career 2018 and 2021 cohorts as they worked the UM pastors facing first the adversity and challenges associated with COVID-19 and the conflict and division in the UMC in 2022 that every pastor needs a diverse web of support including deep peer relationships, wise guides (coaches, spiritual directors, mentors), caring laity in their congregations, restorative niches to flourish and be effective in ministry. Seminaries need to train seminarians in how to establish a diverse webs of support.

Members of the Mid-Career pastors, especially several from the 2021 cohort, have been vocal about the importance of the program and helpful in thinking about ways for participants can contribute to making the Mid-Career initiative sustain able after the grant has ended. The Mid-Career leaders and seminary administration are creating an expanded model that will involve digitalizing much of the content and utilizing graduates of the program to facilitate additional cohorts. This is an exciting and promising avenue for expanding the influence and success of the program with additional pastors and congregations.

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 Innovators cohort has restructured to elevate two participants to the role of “apprentices” who function somewhere between participants and team coaches. Aside from Dr. James, the most key leader in this program is the lead coach / coordinator Christina Robert. In her time with Missional Innovators, she has expanded her work as a spiritual director, transitioned from a role as co-church planter/pastor to co-leader of a “spiritual center” providing spiritual directors and retreats to individuals and organizations. She is also following a passion and call to increase the local offerings for training in spiritual formation and spiritual direction. Additionally, she has taken on roles in other local initiatives, including Awaken Dane, as a lead coach. Through these various roles she has become one of the most networked leaders in the Madison ecclesial ecology and has the significant trust and respect of a half-dozen significant local organizations serving the church. One pastor from the 2018 Mid-Career cohort is now a United Methodist District Superintendent using what he learned in with the 52 pastors and the 89 congregations in his district. Another pastor is now a mentor and coach to younger and inexperienced pastors. Another participant has utilized what he is learning in the program with the 20 paid leaders of his large multi-site congregation.

### ***Partners:***

Partners continue to emerging as we establish our three clergy coaching groups.

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.

Collaboration Project. “CoPro,” as it is known, has been a key partner for the Missional Innovators cohort. As we were preparing to launch the first cohort, CoPro was also being launched. Their goal is to help churches collaborate for the good of the city and the glory of God. CoPro’s board has pivoted their programing toward cohorts that mimic the Missional Innovators model based on the Executive Director’s experience coaching within the Missional

Innovators program for two cohorts. We have designed a plan to transition the Madison Missional Innovators program to CoPro. This phased hand-off will begin in 2023-24.

### 3. REFLECTION

The admonition of the writer of Hebrews that God's people "not neglect to meet together" and that through those meetings they seek to "encourage one another" and "stir up one another to love and works" (Heb 10:19-25) ties together the experiences of grant participants across all three cohorts.

#### *Stories:*

- *As I contemplate the retreat of the New Pastor cohorts at Holy Wisdom Monastery in Middleton, Wisconsin in June of 2022, we certainly experienced the fruit of meeting together. 17 pastors from three graduating classes came together and went about the work of encouraging one another by helping one another to persevere and inviting each other to give witness to the joy set before them as they are acting on God's call to ministry in their respective their places of service. Perhaps the greatest gift of this retreat was the way in which it kept assuring participants of the truth that they were not alone. Not alone in their feelings of loneliness and inadequacy for the pastoral task. Not alone in their frustration with the uneven and sometimes neglectful application of ordination standards by the ecclesiastical powers above them. Not alone in the newness of it all and the seemingly unending list of "firsts" that each week puts before them. The retreat was a place where it was OK to grieve the losses that come with entry into pastoral ministry and celebrate the small victories in feeling like they actually participants in God's work in the lives of the people they serve. It was indeed good to meet together, those who availed themselves of this opportunity were grateful for it.*
- Andrew is a pastor at City Church, a predominantly white non-denominational charismatic megachurch. By his own account, when he started the program he was the kind of person who shut himself off from relationships with neighbors, in part because of assumptions about how he—as a black man—was perceived in his mostly white neighborhood. As a result of the cohort, he began sensing God's invitation into neighboring. This yielded a new imagination not only for his own discipleship and ministry but provoked questions about why his church had no real connection to its neighbors. In an unexpected moment of prayer among the pastors and staff, the Senior Pastor asked Andrew to lead the whole church into more intentional relationship with the community. He is now spearheading efforts to turn this large church outward.
- The following quote from the Mid-Career group is particularly noteworthy because he is a classic example of a pastor who did not develop a robust pastoral identity the first 5 to 7 years of ministry. Matt Bloom's research reveals when this happens pastors every rarely recover from when the first 5 to 7 years do not go well. Drawing on Bloom's research, the clergy coach has worked with the pastor who didn't develop a robust pastoral identity over the pastor two years. Here is an excerpt from his journal that he shared with his coach. *The*



*difference between now and 2021 is amazing! What has made the difference?. . . The examining my routines and then redeeming them . . . and the breakthrough that I experienced in class during last year's May intensive was also a major turning point. This program has changed my life even without the degree. The relationship that I have developed with my coach was worth that price of admission. He has poured so much into my life. I have not had a person impact my life to this degree in a long time. My whole life is on a new trajectory now. Where there was no hope, there was no reason to change.*

- *As I reflect on our second intensive week for the Mid-Career program, I once again feel grateful for the ways that our cohort participated in the realities of that which we had been studying. The second year's focus on a Trinitarian ecclesiology and how to group the church in order to facilitate our community's participation in the very life of God is what we've now experienced two years in a row during the intensive. After months of thinking and reading, so much of what we sought to learn cognitively became lived out in reality. As we worked, learned, and fellowshiped we were united in deep bonds of connection with God and one another. We lived together in authentic Christian community. We had opportunities to watch over one another in love, supporting and encouraging one another through the ongoing challenges of our ministry and lives. As we drew closer to God and one another, the presence of God became so palpable that everywhere we went it seemed that the light of Christ shone through us to others. This was evident in one woman approached us saying that it was clear we were people of God because it "shone" from us as we ate dinner. It was evident in the lives of [deleted names three other people the cohort met in a Microbrewery] sharing deeply of their lives with us as total strangers because unlike their other experiences of church, they could sense from our fellowship that we were different. They wanted to hear the hope of Christ for them, so much so that [name deleted] skipped a bachelorette party as a bridesmaid to return to talk with us for a second night and to receive prayer and the laying on of hands in the middle of a secular business. We experienced the Acts 2 story of gathering together to learn, worship, fellowship, pray, and eat with glad and sincere hearts and in the process of doing so, because of the presence of God through the Spirit in our fellowship, Christ was shared and received in amazing ways. After this second year and week of intensive my greatest hope and challenge is in bringing back all that has been learned and experienced to be lived out in the life of the congregation I serve. If that can happen, the church will surely flourish.*
- *The love of our Triune God was so overwhelming during our week together, that it's hard to imagine how even the hardest heart would melt. And mine did. I haven't fully processed the pandemic, but I realize now that I have been expending a lot of energy in protecting myself. For pastors, the pandemic was a no-win situation – losing congregants, disagreement over health protections and so on down the line. The same was true for me. I just didn't want to be hurt and disappointed anymore so I guarded my heart a little too closely. I realize this now. . . The coursework is important in this course to provide a theological framework for pastoral, church and community flourishing. I am excited about the upcoming papers, and my dissertation! However, our community is the secret sauce. Without the supportive and loving community of my professors and*

*classmates I am not sure how I would have flourished in my pastoral identity at this difficult time.*

- *I have concluded at least three times in the past year that leaving the ministry is the only option. Between the exhaustion, constantly adapting and making decisions that impact others' livelihood, the grief, betrayal, uncertainty, and disappointment of those with high expectations, it's been a year to forget. I sensed a hardness in my heart coming into the 2022 intensive. There is a barrier that I've built that keeps me sane and from feeling the pain to the point of succumbing to it. But I cannot escape the embrace of our Triune God. The community and fellowship of the cohort has reminded me again, of the ways Jesus continues to invite me into the love of God the Father, through the Son, made real to me in the Holy Spirit. By the end of the week that love was indeed made real as the Holy Spirit worked through each member of our group. The barrier is gone, for now. As we discussed how to take what we experienced through our listening, learning, loving, and leaning upon one another to our churches, I could only envision Pigpen, from the Charles' Schultz Charlie Brown series, shuffling off to another venue with the aura of the Holy Spirit and the dust of the rabbi in his wake. It may not be attractive to those looking for a magic fix, but it feels pretty good . . . As I return to my congregation, I face the same questions from others that I have brought to the table, "How do we fix this?" I am now equipped with a different set of answers. There is nothing to 'fix.' There is only the love of God, overturning all our doubts and errors through the life, death, resurrection, and ascension of Jesus Christ, made real by the Holy Spirit who never leaves nor forsakes us.*

### ***Accomplishments:***

Our New Pastor cohorts affirm the adage that even a mediocre covenant peer support group is better than no covenant peer support group. By committing to such a group for a three-year period the members of the New Pastor cohorts are experiencing how important it is to have friends in ministry. Even if things do not click in the beginning, sticking with one another and sharing out of a common experience, is supplying them with some of the energy they need to persevere. One of a pastor's greatest enemies is isolation and a pastor gives him/herself an invaluable gift by regularly meeting with a group of peers who know what it's like to be a new pastor and are willing to talk about that experience with their peers. There is something about that monthly login to the Zoom meeting and the annual retreat that has helped the participants in this program to trust God's call, find their voice and grow in their own faith journeys.

Cultivating a partnership with Collaboration Project is a significant accomplishment for the Missional Innovators group. This partnership will ensure the sustainable continuation of cohorts in Madison for five additional years (10 cohorts) as an expression of that organization's mission and through their financial commitment.

The collaboration 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 Nursing and Physician Assistant faculty. They are 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 cohort into doing consultations with pastors around various dimensions of her work in the Missional Church Consultation Initiative. The Seminary is honing its clergy coaching model and creating a broader conversation with various collaborators around how to integrate the assessments and develop a more holistic approach to their use in theological education.

*Lessons:*

1. Collegial and ecumenical relationships were fostered through the Missional Innovators cohort experience. Friendship in diverse peer community is the greatest felt need expressed by participants, and one of elements of the program that is most celebrated. A cultural anthropologist from Wheaton College who has been conducting ethnographic research in Madison into how white Americans come to be committed to racial justice noted that cohorts came up in her interviews with surprising frequency. She concludes that it “offers a rare and valuable” place for “diverse networks of people” to “build long term trust and common interests with each other,” and that such networks are “a key component in transforming people into active agents for racial justice.”
2. The triad coaching groups – three fellows with one coach – has proven to be an effective approach in the Missional Innovators cohort. These groups provided a more intimate relationship but also a cycle of action and reflection in a setting that mixes mentoring and peer coaching. Participants have also often looked to one another for more informal types of mentoring and encouragement needed for thriving in ministry.
3. Cohort participants have been able to cultivate a missiological imagination stemming from refreshed belief in God’s activity in the world in and beyond the church. The central way this missiological imagination was generated was through the three questions at the core of the cohort experience: Where are we? What is God up to? How is the Spirit inviting us to join?
4. Deep life-giving relationships among ministry peers is crucial to flourishing in ministry and life. The experience of the Mid-Career in-person May 2022 meeting and their narratives about it further reinforces one of the crucial clergy coaching in community emphasis of this Lilly Initiative. What is especially intriguing is the way the cohort’s deepened sense of community during the second May meeting created a space for total strangers to initiate deep conversations with the cohort. The cohort discussed the fact that no one had ever experienced anything quite like it. Bloom’s research helps explain why this is so important. The pastors in both Mid-Career cohorts recount how transformative relationships of unconditional positive regard, openness, and trust are to clergy flourishing.
5. Clergy coaching and spiritual direction play a crucial role in clergy ministry effectiveness and clergy flourishing in ministry. Pastors in the Mid-Career cohorts consistently point to having the support and accountability of a coach and spiritual director as pivotal to wise leadership, ministry effectiveness, and flourishing. Noteworthy is the journal account

shared by the Mid-Career pastor in the 2021 DMin cohort who is beginning to build the robust pastoral identity that had not happened during his first 5-7 years in ministry. His coach and Matt Bloom are in conversation about developing an intervention plan for pastors whose ministries headed down the wrong road in their first 5 to 7 years.

6. 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.
7. 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.

### ***Modifications:***

Two modification that were initiated during the last year include:

- Repositioning the New Career pastor cohorts around geographic areas and incorporating local seasoned pastors into the cohort experience.
- Launching a short-term coaching cohort for Madison Missional Innovators alumni.

## **4. EVALUATION**

### ***Evaluation Strategy:***

The Missional Innovators Assessment of the 2021-22 cohort, based on before and after blind surveys, indicated that:

- 5 of 8 reported meaningful improvements in the quality of their relationships with peers in ministry
- 5 of 8 reported meaningful improvements in the quality of their relationships with mentors in ministry
- 6 of 8 reported improvements in their spiritual vitality
- 5 of 8 reported improvements in how their ministry is going.
- 8 of 8 reported improvements in at least 2 areas
- 3 of 8 reported improvements in 2 of 4 areas

The Mid-Career cohort will be evaluated comprehensively in 2022. There has been ongoing evaluation each year, but the in depth evaluation is scheduled to be completed during the last year of the grant.

**Communication Strategy:**

Reporting on grant activities is an agenda item on Seminary faculty meetings. The University Board of Trustees receives regular updates on the grant. 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, WI community.

**5. NEXT STEPS**

	<i>New Pastors</i>	<i>Missional Innovators</i>	<i>Mid-Career Pastors</i>
January 2023 - December 2023	<ul style="list-style-type: none"> <li>• August 2023 retreat in Madison, WI for the members of all cohorts 2019, 2020, 2021 and 2022</li> <li>• 15 online covenant group meeting, most of which are peer led but five of which (2022 cohort) are mentored by Rev Rohrer</li> <li>• 75 individual meetings with coach or spiritual director</li> <li>• Invitations to the member of the graduating UDTS MDiv class of 2023 to attend the August retreat in Middleton in order to explore setting up a covenant peer support group.</li> </ul>	<ul style="list-style-type: none"> <li>• Spring 2023 begin smaller scale efforts to support Thriving in Ministry in Dubuque, IA and Tampa Bay, FL areas</li> <li>• March 2023 – apply for Sustainability Grant</li> <li>• Recruit for and launch 2022-23 cohort with emphasis on recruiting Director-level church staff</li> <li>• Confirm, contract and train (3) coaches for 2022-23 cohort</li> </ul>	<ul style="list-style-type: none"> <li>• Year 3 6-day May 2023 for 2021 cohort Intensive</li> <li>• Year 5 3-day May 2023 Retreat 2018 Cohort</li> <li>• Evaluate and revise DMin curriculum</li> <li>• Integrate the assessments to create a blended curriculum/competency DMin</li> <li>• Incorporate a thriving congregation dimension into revised 2021 DMin</li> <li>• Expand the use of Bloom’s Well Being assessment with laity</li> <li>• Explore <i>Take Flight Learning</i> Emotional Intel assessment</li> <li>• Hire DeShon to create an effectiveness assessment for pastors &amp; laity</li> <li>• Use CAT assessment with 2021 cohort</li> <li>• Recruit pastors from initial DMin cohorts to lead additional cohorts</li> </ul>

In March 2023, we submitted an application for a sustainability grant, which details our plans for sustaining and/or expanding two of the three initiatives in the original grant – the Missional Innovators cohort and the Mid-Career cohort. The most significant partner in this work is Collaboration Project who has committed to provide leadership and funding for 9 additional Madison cohorts following our model beyond the grant period.

## THRIVING IN MINISTRY INITIATIVE BASELINE DATA GUIDELINES

**A. Name of Organization: University of Dubuque Theological Seminary**

<b>B. Clergy Cohorts</b>	<b>2022</b>	<b>Total to Date</b>
Number of cohorts begun by your project	1 (NP) 1 (MI) 0 (MC)	10
Number of pastoral participants in cohorts	8(NP)* 10 (MI)* 22 (MC)*	103
Number of congregations represented in cohorts	17 (NP) 9 (MI)* 25 (MC)*	122

<b>C. Other Learning/Training Events</b>		
Number of events conducted by your project	15 (NP)* 19 (MI)* 3 (MC)*	90
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)* 19 (MC)*	156

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

### **D. Interesting statistics or trends of note.**

In Madison, in conjunction with another initiative for which we are a partner, we are tracking several stats and trends among Dane County pastors including:

- Whether they have neighbors they consider friends
- How many pastors in Dane County they know by name and consider friends
- How many of the pastors they know by name and consider friends happen to serve churches that meet within 2 miles of their church building
- To what extent they trust the pastor(s) of the church that meets nearest to their church building
- How they would describe their desire to build relationships with other church leaders serving in Dane County
- Whether they approach other Dane County clergy as siblings in Christ
- Whether, in the last 6 months their church collaborated with another church any of several ways

All responses are indicated on a 5-point Likert scale. We have baseline (2021) for these numbers, but have not conducted a full follow up study yet (scheduled for summer 2023.) As the items suggest, these are ways of measuring ecumenical openness, friendship and collaboration, as well as rootedness in place and relationships – all factors related to thriving in ministry and thriving congregations.

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

<b>Date</b>	<b>Event and Description</b>	<b>Location</b>
(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)* March 2023 October 2023	Spring Retreat 2-day Kick-off retreat for 2 Madison cohorts	Dubuque, IA Madison, WI
(MC)* May 22-27 May 29-31 Ongoing June 2-3 June 6-7 June 8-9 June 10-11	2021 Cohort May 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	Dubuque, IA Dubuque, IA Zoom West Des Moines, IA Schaumburg, IL Peoria, IL Green Bay, WI

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# University of Dubuque

Budget

Grant No. 2018 0972

	<b>Total Grant Budget</b>	<b>Expenditures For Period 01/01/22-12/31/2022</b>	<b>Grant Cumulative</b>	<b>Grant Balance</b>
<b>PERSONNEL</b>				
Administrator Salary	\$ 240,456.00	\$ 54,636.00	167,560.02	\$ 72,895.98
Fringe	66,364.00	7,605.80	36,918.45	29,445.55
Coach Salary, New Pastors	66,364.00	13,659.00	52,294.96	14,069.04
Coach Salary, Missional Innovators	66,364.00	13,659.00	52,295.00	14,069.00
Coach Salary, Mid-Career	26,581.00	0.00	26,581.00	0.00
	466,129.00	89,559.80	335,649.43	130,479.57
<b>ADMINISTRATIVE COSTS</b>				
Supplies	2,500.00	255.34	1,016.93	1,483.07
Printing	2,250.00			2,250.00
	4,750.00	255.34	1,016.93	3,733.07
<b>PARTICIPANT TRAVEL TO DUBUQUE</b>				
New Pastors Cohort				
Travel/Lodging/Meals	92,000.00	14,681.83	17,775.65	74,224.35
Missional Innovators Cohort				
Travel/Lodging/Meals	38,165.00	5,805.36	10,852.74	27,312.26
Mid-Career Cohort				
Travel/Lodging/Meals	55,065.00	12,626.10	31,717.27	23,347.73
April Retreat Refreshments	5,280.00	0.00	249.00	5,031.00
	190,510.00	33,113.29	60,594.66	129,915.34
<b>COACHING SESSIONS</b>				
New Pastors Cohort Coach				
Travel/Meals	22,500.00	2,902.21	6,680.77	15,819.23
Missional Innovators Cohort Coach				
Travel/Meals	11,426.00	77.75	3,017.71	8,408.29
Mid-Career Cohort Coach				
Travel/Meals	24,310.00	5,970.07	12,414.11	11,895.89
	58,236.00	8,950.03	22,112.59	36,123.41
<b>SKILL DEVELOPMENT RESOURCES</b>				
Assessment Tests	5,720.00	0.00	1,000.00	4,720.00
Books and Videos	2,250.00	56.78	528.07	1,721.93
Focused Consulting	155,517.00	45,217.52	81,751.43	73,765.57
	163,487.00	45,274.30	83,279.50	80,207.50
Sub-Total Expense	883,112.00	177,152.76	502,653.11	380,458.89
Indirect Costs	52,990.00	1,250.28	5,603.41	47,386.59
<b>TOTAL EXPENSES</b>	<b>\$ 936,102.00</b>	<b>\$ 178,403.04</b>	<b>\$ 508,256.52</b>	<b>\$ 427,845.48</b>
<b>CASH SUMMARY</b>				
Total Grant Payments Received	\$ 936,102.00			
Cumulative Grant Expense	-508,256.52			
Cash Balance	\$ 427,845.48			

*Rev. Dr. Karen Nelson*  
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 Project Director

*James Steiner*  
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 Vice President for Finance