

TASK FORCE ON CLERGY LEADERSHIP FORMATION IN SMALL CONGREGATIONS

Membership

The Rev. Dr. Susanna Singer, <i>Chair</i>	California, VIII	2018
Ms. Demi Prentiss, <i>Vice-Chair</i>	Dallas, VII	2018
Canon Thomas G. O'Brien, III, <i>Secretary</i>	Southeast Florida, IV	2018
The Rt. Rev. Scott Benhase	Georgia, IV	2018
The Rev. Robin Biffle	Spokane, VIII	2018
Ms. Ruth Frey	Washington, D.C., III	2018
The Rev. Maureen-Elizabeth Hagen	Oregon, VIII	2018
The Rev. Canon Gregory A. Jacobs	Newark, II	2018
The Rev. Dr. Trawin E. Malone	Texas, VII	2018
The Rev. Merry Chan Ong	California, VIII	2018
Ms. Mary Parmer	Texas, VIII	2018
The Rev. Canon Bradford Purdom	Ohio, V	2018
The Rt. Rev. Alan Scarfe	Iowa, VI	2018
The Rt. Rev. Robert Skirving	East Carolina, IV	2018
The Most Rev. Michael Bruce Curry, <i>Ex-Officio</i>	North Carolina, IV	2018
The Rev. Gay Clark Jennings, <i>Ex-Officio</i>	Ohio, V	2018

CHANGES IN MEMBERSHIP

There was one change to the Task Force's membership during the triennium. The Ven. Paul Sneve resigned from the Task Force in September 2016 because his duties changed.

REPRESENTATION AT GENERAL CONVENTION

Bishop Scott Benhase and Canon Thomas G. O'Brien III, *Secretary*, are authorized to receive non-substantive amendments to this Report at General Convention.

Mandate

The Task Force was created by Resolution 2015-A045 which is excerpted below:

Resolved, the House of Bishops concurring, That the 78th General Convention authorize a task force with membership appointed by the Presiding Officers consisting of no fewer than ten (10) nor more than twenty (20) representatives including, but not limited to, representatives from local diocesan programs, representatives from seminaries, ecumenical representation, or representatives who are engaged in advanced theological education; and that the task force

be made up of bishops, priests, deacons, and laity to explore quality programs for formation, for expanding education opportunities for clergy and laity, for collaboration between local diocesan school programs and seminaries, for ecumenical collaboration, and to explore a wide range of delivery methods. The task force shall report back to the 79th General Convention with a plan to provide quality formation for clergy in small congregations that is affordable, theologically reflective, and innovative.

Summary of Work

MEETINGS DURING THE TRIENNIUM

The Task Force met in person at the Maritime Institute in Linthicum Heights, MD from November 19, 2015 to November 21, 2015; at the Crown Plaza O'Hare Hotel in Chicago, IL from November 3, 2016 to November 5, 2016; and at the Red Lion Inn and Conference Center in Renton, WA from September 28 to September 30, 2017. The Task Force also held four (4) meetings of 1.5 hours each using Adobe Connect. These electronic meetings were held on April 20, 2016; September 14, 2016; February 1, 2017; and May 3, 2017. The Task Force expects to meet electronically in February 2018.

At each Adobe Connect meeting, the Task Force received oral reports from the chairs and members of the sub-committees that were established to develop information regarding each of the areas of concentration.

At its in-person meeting in September 2017, the Task Force reviewed and revised a draft of this Blue Book Report.

A PLAN FOR QUALITY FORMATION

The mandate for the Task Force was to develop a plan for quality formation for clergy in small congregations that is affordable, theologically reflective and innovative.

The Explanation to Resolution 2015-A045 defined a “small congregation” as one having an Average Sunday Attendance [ASA] of less than one hundred (100) persons. It noted that sixty-nine (69) percent of Episcopal congregations have an ASA of less than one hundred (100), and that the median ASA is sixty-one (61). The Task Force used this definition of “small congregation” in conducting its work.

To fulfill its mandate, the Task Force identified its areas of concentration, conducted substantial research, developed findings from that research, and is proposing six (6) resolutions.

The six (6) resolutions stated below constitute an integrated plan to improve clergy and lay

leadership formation for small congregations. Five (5) of the six (6) resolutions relate primarily to clergy formation. Because our findings showed that effective clergy in small congregations need strong lay leaders in those congregations, some of the resolutions concern the development of strong lay leaders.

AREAS OF CONCENTRATION

At the initial meeting in November 2015, the Task Force, in response to Resolution 2015-A045, decided to concentrate on research into the following specific areas during the triennium. Our goal has been to identify and understand the situation on the ground, in order to base our proposals on as much current data as possible:

1. Finding out what capacities and skills are perceived as most necessary for clergy and lay leaders in small congregations.
2. Exploring whether there is a means by which persons seeking ordination who intend to serve small congregations in non-stipendiary or bi-vocational positions can be financially supported in their formation programs. These programs may include local formation programs, long-distance learning with seminaries, and other forms of theological education. The goal is to encourage persons to seek ordination for non-stipendiary and bi-vocational positions without their having to incur substantial expense or debt.
3. Assessing different approaches needed to encourage under-represented populations to consider leadership in The Episcopal Church [TEC] as lay persons and as ordained persons.
4. Evaluating the potential for collaboration among local formation training programs and seminaries.
5. Exploring the usefulness of a central system or group of coordinated systems by which curated formation resources (written, audio, streamed, web-based) can be made available to congregations, dioceses, formation leaders and others.
6. Discerning the need for providing networking and resources to bishops, commissions on ministry, and local discernment committees to assist them in raising up clergy and lay leaders in their dioceses, particularly for small congregations.

RESEARCH PERFORMED BY THE TASK FORCE

To get a clear picture of the needs of TEC for the formation and training of clergy leaders for small congregations, the Task Force conducted an extensive online survey on formation of clergy and lay persons to which forty-eight (48) Bishops, thirty-eight (38) canons to the ordinary and thirty-one (31) chairs of commissions on ministry responded. Follow up interviews

were conducted with thirty-seven (37) persons. The Task Force also conducted extensive interviews with twenty-six (26) selected leaders involved in formation for ministry. The conversation partners were relatively diverse, and geographically and contextually representative.

The Task Force also conducted more general research, in order to understand current perspectives, thinking, and practices in TEC and beyond about clergy leadership formation for small congregations. Task Force members were diligent in seeking out and sharing articles, reports, position papers, and other documents with each other via the Extranet and the internet. Several Task Force members attended specific events that focused on areas of interest for the Task Force, notably the “Uncharted Waters” conference on diocesan schools hosted by the Diocese of Minnesota in June 2017.

The bishops on the Task Force brought a brief online follow-up survey to the September 2017 House of Bishops meeting to confirm that the directions taken by the Task Force were in accord with the bishops’ understanding of the needs of TEC. The response of the forty-eight (48) responding bishops overwhelmingly confirmed the research findings and supported the elements of the plan developed by the Task Force.

The Task Force also received a \$7,000 Roanridge Grant to be used to fund a consultant to convene several web-based conversations with groups of key formation leaders and decision-makers during January and February 2018.

FINDINGS OF THE RESEARCH REGARDING FORMATION GENERALLY

1. There is already a wealth of resources available for leadership formation for small congregations. Those resources are created and curated by large and small congregations and dioceses across The Episcopal Church, from many different cultural and theological orientations. The general lack of awareness of the existence of those resources, and the purposes they serve, demonstrates the need for a formation networking system.
2. There is a strong need to coordinate and disseminate existing resources and best practices throughout TEC in the areas of vocational discernment, ministry development, lay and clergy leadership formation, and congregational vitality. Where gaps exist, and as new contexts require new solutions, there is also a need for increased collaboration among those creating such resources and best practices. These resources are needed for congregations of all sizes, though small congregations and small dioceses have pressing and very specific needs.
3. Effective ministry in small (and larger) congregations always depends on collaboration between well-formed clergy and strong lay leaders. Based on our research, several of our recommendations address the need for robust discernment and formation for both clergy and

lay leadership so that small congregations, which constitute most of the congregations in TEC, may be most effectively served.

4. Bishops play an essential and growing role in directing and coordinating the formation of clergy and lay leaders in their dioceses. Their capacity to realize a diocesan vision and strategy for leadership formation is crucial to identifying and forming clergy and lay leadership, especially in small congregations in which non-stipendiary or bi-vocational clergy are often needed.

5. While many dioceses provide some training for commissions on ministry, the data shows that the need for small-congregation-specific training is perceived to be great, especially in flexible approaches to vocational discernment. Some excellent resources exist in individual dioceses, but general guidelines and best practices are not generally available throughout the dioceses of TEC. This is a felt need across TEC, and small dioceses with limited resources would particularly benefit from the coordination and dissemination of discernment resources and best practices.

6. There is limited availability of appropriate and culturally-sensitive vocational discernment and formation materials and strategies for clergy leaders called from ethnic minority communities. Key leaders from several of these communities expressed the need for flexible and culturally-differentiated approaches to discernment and formation. In these congregations, the role of the entire community (especially its elders) is critical not only in the initial discernment of clergy vocations in individuals, but for supporting candidates throughout the process of formation. There is also a clear need for greater availability of suitable formation resources in Spanish.

7. There are robust non-seminary programs for theological education and formation at the diocesan and regional levels. There is also an increased willingness on the part of some seminaries to create alternative accredited degree and certificate programs with flexible residence requirements. Some seminaries also collaborate with individual dioceses on local, non-accredited theological education and formation for clergy and lay leaders for small congregations.

8. Although there are some successful diocesan-seminary collaborations, the “silo effect” of separately incorporated seminaries and stand-alone diocesan formation programs works strongly against extensive collaboration or coordination across TEC.

9. Scholarship funding for non-traditional theological education and formation programs is scarce, and there are wide disparities in the ability of dioceses to support non-traditional education. Potential candidates for non-stipendiary and bi-vocational ministry in small

congregations need greater access to scholarship funds so that they are not burdened with substantial debt when they answer calls to ministries that provide little or no remuneration to them.

FINDINGS OF THE RESEARCH REGARDING SMALL CONGREGATIONS

1. Bishops report that fifty (50) to seventy (70) percent of their congregations are in the “small” category, mostly in small towns and rural settings. The Average Sunday Attendance [ASA] is mostly between twenty (20) and one hundred (100), with a substantial minority of congregations lower than twenty (20) ASA.

2. The principal demographic categories of the members of these congregations are middle class, mature adults, and elderly/retired persons, with secondary categories of those with fixed incomes or in the working class. Very few small congregations have many affluent or financially secure parishioners, and few have many young adults or families with children. The education level of the parishioners is generally college or high school. Very few have members with less than high school education or with post-graduate education. These congregations are overwhelmingly Anglo/White/Western, with some African-American and Latino/Hispanic (mostly bilingual) and very few others.

3. Small congregations and diocesan leaders say they need their clergy to be evangelists, change agents and mission focused leaders. What they say they most value are pastoral skills. Most do not recognize a need for intercultural and intergenerational competence.

4. Key Capacities and Skills seen as Crucial for Clergy Leaders in Small Congregations are:

- Deep spirituality focused on discipleship. Self-reflective, examined spiritual lives.
- Transparent, self-differentiated and a collaborative leadership style.
- True vocation to small congregational leadership and love of small communities.
- Strong relational, collaborative and networking skills; and the ability to use them both within the congregation and in the wider community.
- Deep commitment to raising up, training, supporting, and empowering lay leadership.
- Clear and compelling theology of mission and ministry and the ability to inspire others to embrace this.
- Evangelism and the ability to relate the Gospel to life.
- Teaching and mentoring skills.
- Capacity to discern collaboratively a shared new vision with a congregation, and to inspire the community of faith to embrace the changes needed to live it out.

5. Key Capacities and Skills seen as Crucial for Lay Leaders in Small Congregations are:

- Awareness of the dignity and worth of baptismal ministry, and the necessity of strong lay leadership in collaboration with ordained persons.
- Deep spiritual formation and strong faith, leading to lowered levels of anxiety and higher levels of hope.
- Clear, shared vision, discerned and embraced by the whole community of faith.
- Ability to connect faith to daily living.
- Strong awareness of the specific qualities, needs, challenges and gifts of the context in which they live and minister.
- Clear, transparent, healthy patterns of communication and interpersonal dynamics.
- Generosity and sense of abundance.
- Courage to try new things, flexibility and confidence.

6. An encouraging finding is that the same pastoral skills that have been so highly valued are also deeply relevant to present-day desired leadership skills, namely, collaboration, networking, teaching, mentoring, empowering, evangelizing and inspiring. This seems to indicate that a change in the focus and use of traditional clergy skills is needed, rather than the creation of an entirely new skill set.

Proposed Resolutions

RESOLUTION A022: CREATE A FORMATION NETWORKING TEAM

Resolved, the House of _____ concurring, That the 79th General Convention direct that a Formation Networking Team be established under the Office of the Presiding Bishop to serve as a networking referral hub for existing and specially-developed resources (online and otherwise) for the discernment of clergy and lay vocations, for clergy and lay formation, and for training clergy and lay leaders in matters such as evangelism, spiritual practices, discipleship, collaborative leadership, characteristics of small communities, relational and networking skills, raising up and empowering lay leadership, relating the Gospel to life, racial reconciliation, teaching and mentoring, and inspiring communities of faith; and be it further

Resolved, That the 79th General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$900,000 for the implementation of this resolution.

Explanation:

The findings of the Task Force consistently indicate that many dioceses, commissions on ministry, discernment committees and congregations find it difficult to identify and access suitable resources for training and guiding those responsible for vocational discernment and to identify and access effective resources for the formation and training of new clergy and lay leaders for small congregations.

To address these needs, the Task Force recommends that a Formation Networking Team be formed under the Office of the Presiding Bishop. The Formation Networking Team would be available by telephone and e-mail to individuals, Christian educators, clergy, commissions on ministry, discernment committees and congregations and dioceses that seek assistance in these areas. In due course, the Task Force expects that the Formation Networking Team would create a well-focused website of curated resources that allows users to evaluate the suitability of materials for their particular needs and contexts. In addition to making existing resources more readily available, the Formation Networking Team would help further collaboration by seeking to connect interested parties in the creation of new resources as necessary and helpful.

Questions regarding formation for ordination arise in a rapidly-changing landscape of programs and demands. The Formation Networking Team will enable timely responses to the pressing, time-sensitive needs of dioceses and congregations. A knowledgeable Team with a broad perspective of offerings across the Church will increase access to formation opportunities, especially for small congregations and dioceses.

Four (4) of the other resolutions proposed by the Task Force amplify the work that would be done by the Formation Networking Team.

The persons serving as the Formation Networking Team will need to be theologically trained so that they can properly evaluate resources which already exist in many forms and in many places. All members of the Formation Networking Team will need to be approachable and good listeners so they can direct persons to suitable resources. They will need to become familiar with the many resources currently available, and will need strong networking skills to promote sharing across the Church.

Having a Formation Networking Team will “level the playing field” so that congregations and dioceses with fewer financial and time resources can gain greater and faster access to what they need.

The members of the Formation Networking Team will need a small voluntary support committee to assist in evaluating and categorizing resources and making the Team aware of

developing needs across the Church.

RESOLUTION A023: ASSIST VOCATION DISCERNMENT GROUPS

Resolved, the House of _____ concurring, That the 79th General Convention, if a Formation Networking Team is created, direct the Team to collect, evaluate and encourage the sharing of excellent resources for the training of commissions on ministry and discernment committees for clergy and lay vocations and to publicize to The Episcopal Church, its dioceses and congregations the availability of these resources; and be it further

Resolved, That, if a Formation Networking Team is not created, the 79th General Convention direct that an appropriate body or office in The Episcopal Church collect, evaluate and encourage the sharing of excellent resources for the training of commissions on ministry and discernment committees for clergy and lay vocations and publicize to The Episcopal Church, its dioceses and congregations the availability of these resources; and be it further

Resolved, That, if a Formation Networking Team is not created or is not funded, the 79th General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$60,000 for the implementation of this resolution.

Explanation:

While many dioceses provide some training for commissions on ministry, the data shows that the need for small-congregation-specific training is perceived to be great, especially in relation to flexible approaches to vocational discernment. Some excellent resources exist in individual dioceses, but guidelines and best practices are not generally shared among the dioceses of TEC. Small dioceses with limited resources would particularly benefit from the coordination and dissemination of resources and best practices.

Dissemination of best practices will also encourage commissions on ministry to address lay vocations as called for in Title III. Commissions on ministry need training in discerning and supporting lay vocations. Networking among dioceses will encourage sharing of best practices in this area.

RESOLUTION A024: FORMING CULTURALLY DIVERSE CLERGY

Resolved, the House of _____ concurring, That the 79th General Convention, if a Formation Networking Team is created, direct the Team to collect, evaluate, disseminate, and encourage the development of excellent resources and best practices for the discernment and formation of culturally diverse clergy, and to publicize to The Episcopal Church and its dioceses and congregations the availability of these resources; and be it further

Resolved, That, if a Formation Networking Team is created, the Formation Networking Team work with other teams and established groups within The Episcopal Church to make available information to persons involved in culturally diverse ministries and Christian formation, and to seek feedback regarding resources needed (and used) by the widest possible variety of groups within the Church; and be it further

Resolved, That, if a Formation Networking Team is not created, the 79th General Convention direct that an appropriate body or office in The Episcopal Church collect, evaluate, disseminate, and encourage the development of excellent resources and best practices for the discernment and formation of culturally diverse clergy, and to publicize to The Episcopal Church and its dioceses and congregations the availability of these resources; and be it further

Resolved, That, if the Formation Networking Team is not created, the 79th General Convention direct that an appropriate body or office, work with other teams and established groups within The Episcopal Church to make available information to persons involved in culturally diverse ministries and Christian formation, and to seek feedback regarding resources needed (and used) by the widest possible variety of groups within the Church; and be it further

Resolved, That, if a Formation Networking Team is not created or is not funded, the 79th General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$60,000 for the implementation of this resolution.

Explanation:

Most institutions within The Episcopal Church are controlled by Anglo/Whites/Westerners. The fact that the Presiding Bishop is a person of color does not mean that there is still not substantial work to diversify leadership in The Episcopal Church.

There are significant cultural differences between (and within) racial and ethnic groups, and all of them have different histories with The Episcopal Church. Economic and class distinctions also present complicating issues.

All congregations and clergy should be encouraged to identify, recruit and mentor people of diverse racial, cultural and ethnic backgrounds who are discerning vocations to lay or ordained ministries. There is a specific need to train commissions on ministry in recognizing and dismantling barriers that traditional discernment processes present to aspirants for ordination who come from (and who may serve in) ethnic minority congregations or from congregations with a sizeable proportion of people of color. Culturally appropriate

approaches to theological educational are also needed in seminaries and other settings.

It is expected that the Formation Network Team would work closely with the Executive Council Committee on Anti-Racism and the Ethnic Ministries Department of TEC to make resources available to as many persons as possible.

RESOLUTION A025: BISHOPS AND SMALL-CONGREGATION CLERGY

Resolved, the House of _____ concurring, That the 79th General Convention, if a Formation Networking Team is created, direct the Team to offer to work with the House of Bishops to assist bishops by providing excellent resources and best practices in their work of identifying and forming clergy and lay leaders for small congregations in their dioceses; and be it further

Resolved, That, if a Formation Networking Team is not created, the 79th General Convention direct an appropriate body or office in The Episcopal Church to offer to work with the House of Bishops to assist bishops by providing excellent resources and best practices in their work of identifying and forming clergy and lay leaders for small congregations in their dioceses; and be it further

Resolved, That, if a Formation Networking Team is not created or is not funded, the 79th General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$30,000 for the implementation of this resolution.

Explanation:

The bishop is always a key player in the identification and formation of clergy in the diocese and in shaping the attitudes in the diocese towards small congregations. Bishops indicated in their interviews and survey responses that resources to assist them in this task would be welcomed.

RESOLUTION A026: IDENTIFY EFFECTIVE FORMATION MODELS

Resolved, the House of _____ concurring, That, if a Formation Networking Team is created, the General Convention direct the Team to assemble and make available to dioceses a variety of effective models, both local and collaborative, for the formation of priests and deacons to serve in small congregations; and be it further

Resolved, That, if a Formation Networking Team is not created, the 79th General Convention direct that an appropriate body or office in The Episcopal Church assemble and make available to dioceses a variety of effective models, both local and collaborative, for the formation of priests and deacons to serve in small congregations; and be it further

Resolved, That, if a Formation Networking Team is not created or is not funded, the 79th General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$30,000 for the implementation of this resolution.

Explanation:

The current landscape for clergy formation is complex. Many dioceses have developed local formation programs and schools. There are several non-accredited programs used by a variety of dioceses. Some seminaries have made significant changes in recent years in the way they deliver theological education in non-conventional ways (through low-residence programs and through collaboration with local formation programs). All these developments have strong potential to serve the needs of those preparing for ministry in small congregations.

Survey data indicates that bishops and commissions on ministry seek a variety of models for effective formation strategies. There is interest in how collaboration among seminaries and diocesan schools can be done effectively, since low-residency programs at seminaries are best used in close collaboration with diocesan programs. Dioceses increasingly seek flexible and adaptable approaches that meet the formational needs of a variety of aspirants. “Cross-order formation” for priests, deacons and laypersons, in which all orders study together at least part of the time, is increasingly seen as both possible and desirable.

RESOLUTION A027 NEW FUNDING FOR CLERGY FORMATION

Resolved, the House of _____ concurring, That the 79th General Convention direct the Executive Council to establish a committee of Executive Council with membership appointed by the Presiding Officers consisting of no fewer than ten (10) nor more than twenty (20) representatives. The committee shall include, but not be limited to, representatives from local diocesan clergy formation programs, representatives from seminaries (particularly persons involved in tuition assistance programs), fund development professionals within The Episcopal Church, and representatives from organizations (such as the Society for the Increase of Ministry and United Thank Offering) that provide funds to assist persons in advanced theological education. The committee shall be made up of bishops, priests, deacons, and laity. It shall develop and implement a plan to provide need-based central scholarship funding to individuals pursuing theological education who are preparing to serve as priests or deacons in non-stipendiary positions or in bi-vocational ministries in small congregations. This plan shall work to expand the funding available to aspiring priests and deacons who are engaged in theological education other than full-time seminary education. In addition to considering other funding sources, the committee shall examine the possible use of donor-directed endowment funds held in trust by the Domestic and Foreign Missionary Society [DFMS] as a partial means to fulfill this mandate.

Explanation:

There is little scholarship funding available to persons pursuing theological education other than in seminary M.Div. programs.

If a person seeking ordination intends to serve in a non-stipendiary position or in a bi-vocational ministry in a small congregation, a substantial impediment to pursuing this goal is the cost of obtaining the necessary education. Even the reduced cost of theological education in a non-residential setting or in a diocesan program can present a significant barrier to many potential clergy. Some for whom a costlier program might be most appropriate are prevented from pursuing that program because of financial constraints.

Moreover, funding theological education of any kind puts financial strain on many smaller dioceses. The Task Force perceives that creating a need-based, central scholarship fund is a justice issue. The fund would significantly level the playing field and enable access to a wider variety of educational resources by those who most need them.

The findings of the Task Force indicate that in the future, an increasing number of ordained ministers in The Episcopal Church will be non-stipendiary or bi-vocational. The data also shows that small congregations will depend more heavily on these clergy. To meet the need of small congregations for clergy and to avoid burdening these clergy with substantial debt, new strategies to provide funding for their theological education are needed.