

# LIFE-LONG LEARNING AND DEVELOPMENT FOR FAITHFUL LEADERS



## Continuing Education in the Evangelical Lutheran Church in America: A Vision and Strategy Statement

### Preface

The 1995 Churchwide Assembly moved "to direct the Division for Ministry to assess the state and current practices of continuing education among all our rostered persons, and to bring to the 1997 Churchwide Assembly recommendations that serve both the church and rostered persons' needs for ongoing spiritual formation, theological growth, and leadership development beyond the first three years under call."

The Beyond First Call Theological Education Task Force appointed by the Division for Ministry Board reviewed the current ELCA policy statements and documents. These documents reveal a consistent commitment to a vision of rostered leaders (i.e., ordained ministers, associates in ministry, deaconesses, and diaconal ministers) who continue to grow, while practicing appropriate self-care and providing leadership for the sake of God's mission. Using current data from the ELCA Department of Research and Evaluation the task force assessed the state and current practices of continuing education.

This report is intended for study and use with all leaders in all expressions of this church. It builds upon and is congruent with current ELCA vision and strategy for continuing education. It especially seeks to address concerns which prompted the 1995 resolution:

- clergy morale and well-being, amid reports of burn-out, sexual abuse, substance abuse, incompetence,
- median length of call only five years,
- insecure status and financial constraints of our continuing education providers, both seminaries and continuing education centers,
- failure of rostered persons to use all the time now being provided for continuing education, even though funding provided by rostered leaders and congregations has increased dramatically.
- lack of documented partnership of clergy/AiM with congregation or agency leaders in planning continuing education (37% of clergy filing a Continuing Education Covenant),
- climate (i.e., orientation more to past than to future) and/or financial stress of congregation as barriers to open and positive consideration of continuing education for church staff,
- congregations and rostered leaders who look inward with survival goals rather than looking outward with mission goals,
- rostered persons who feel ill-equipped to lead in our rapidly changing cultural milieu.

The task force concluded that any recommendations for change in continuing education must be systemic (implemented through an interdependent network of rostered leaders, congregations and agencies, synods, churchwide) and holistic (affecting the spiritual, physical, emotional, social, interpersonal, vocational and intellectual well-being of rostered leaders).

## Envisioning Statement

The Division for Ministry Report to the 1995 Churchwide Assembly on The Study of Theological Education (“Faithful Leaders for a Changing World: Theological Education for Mission in the ELCA”) identified Life-Long Learning as the seventh of eleven theological education imperatives. The report concluded its remarks on this imperative: “...this church must encourage and provide resources for its lay and ordained leaders to continually develop and renew their gifts for ministry through disciplined patterns of life-long learning.” Therefore, in order for this church to be faithful to its call to mission in our complex cultural milieu, it must seek out and support pastors, associates in ministry, deaconesses, and diaconal ministers, who actively seek to live as persons under the Gospel and who are prepared to engage in a lifetime of biblically grounded and confessionally based theological reflection and discourse. This church must expect, encourage, and make it possible for those it calls to develop healthy and intentional habits that continually work to deepen faith in Jesus Christ as Lord and Savior, nurture spiritual formation, attend to physical and emotional health, strengthen theological capacity and articulation of the Gospel, enhance leadership gifts, and expand both interpersonal skills and practical skills for ministry.

This church envisions:

1. The engagement of all the baptized in learning and growing together in mission and ministry;
2. An ethic which values the personhood, health, and continuing growth of both the rostered leaders and laity;
3. An environment in which intentional continued learning and development are valued and expected, and the rostered leaders enjoy supportive partnerships with their congregations or agencies, colleagues, and the synodical and Churchwide expressions of this church;
4. An awareness of the variety of ways through which persons learn and grow; and
5. An abundance of synodical and churchwide resources as well as adequate funding committed to life-long theological education.

### A Statement of Expectations

1. All rostered leaders of the Evangelical Lutheran Church in America are expected to provide for their own health and growth, and to be accountable to the congregations and synods of this church and to their colleagues in ministry for their life-long learning and development.

2. Holistic life-long learning and development includes:
  - a. A minimum of 50 contact hours per year of intentional continuing education, or 150 hours each three year period. This time neither to be understood as vacation by the rostered person or by the congregation/agency, nor is it to be used for training for synodical, congregational, or agency programs. It may include guided independent study and reading;
  - b. Spiritual disciplines, including prayer, meditation, devotion;
  - c. Habits of personal study that are enriched through reading, reflection and dialogue with colleagues;
  - d. Regular worship, including frequent participation in worship in non-leadership roles;
  - e. physical exercise, rest, attention to emotional and interpersonal health (see EXHIBIT C); and
  - f. Involvement beyond the congregation or agency in pursuit of a more just and compassionate society
3. Rostered persons will plan an extended study and renewal period of a minimum of one to three months every three to five years in the present call beyond the First Call Theological Education program, consulting with peers and synod staff, as well as representatives of the congregation or agency (See EXHIBIT A)
4. All rostered persons are expected to initiate an annual review of their continuing education needs and plans with an appropriate group within their congregation or agency. Goals for the coming year are to be established which take into consideration the needs of the congregation or agency as well as those of the rostered person. A brief report of this review is to be made to the synod for inclusion in the rostered person’s file. (See EXHIBIT B)
5. The process for promoting participation in these expectations shall be established by the synods, which have primary responsibility for the oversight of rostered persons. This process may include meeting periodically with the bishop or synod staff for consultation, review and encouragement with regard to continuing growth and development.
6. Funding is according to Division for Ministry guidelines, but synods may set higher guidelines. Synods are encouraged to develop a special fund designated for continuing theological education of their rostered leaders. Congregations might contribute to this fund through offerings taken at services of ordination, consecration and installation. Grants might also be sought for such a fund.

## A Systemic Approach to Carry Out the Vision

The primary responsibility for the continuing theological education of the rostered person lies with the rostered person. However, the rostered person exists within a network of relationships, and therefore, continuing theological education must be considered systemically. The classic image of the Church as the Body of Christ provides guidance in thinking systemically. For the Body has many members, with quite different functions and characteristics. They function well together when they are animated by the same Spirit, and when they respect each other's functions, and keep ever before them the larger mission which is their common work.

The system here proposed includes most directly the rostered person, the congregation or agency being served, and the synod. Less directly involved are other partners: seminaries, centers of continuing theological education, and churchwide offices. Each of the partners in the system has particular responsibilities, is accountable to others in the system, and is expected to support the others. Responsibilities that relate most directly to rostered persons are listed below.

### **Rostered Leader**

1. Commits to life-long learning and growth through intentional participation in continuing education. Such education is planned collegially and involves partners in ministry in the congregation or agency and/or peers and synod leaders.
2. Takes seriously the total stewardship of life: spiritual, physical, vocational, social, interpersonal, emotional, and intellectual well-being.
3. Communicates regularly with the synod, filing learning covenants and reporting continuing education and personal issues.
4. Plans extended study every three to five years in the present call, including mutual ministry assessment with synod, congregation/agency, peers.
5. Participates in an intentional colleague group.

### **Congregation or Agency**

1. Calls rostered leaders with the expectation that both congregation/agency and leader will continue to learn and grow through intentional participation in continuing education.
2. Establishes an appropriate congregational or peer group to maintain regular assessment of educational needs, learning goals, and continuing education options for the rostered leader.
3. Provides an appropriate share of the funding and all the time needed for intentional continuing education programs for both rostered and congregational or agency leaders.
4. Respects rostered persons' needs for appropriate self-care.
5. Advocates partnership in learning between rostered persons and congregation/ agency leaders.

### **Synod (in partnership with region and churchwide)**

1. Expects that its rostered leaders continue to learn, grow, and develop through intentional participation in continuing education and leadership development, and that congregations and agencies fully support such expectations, especially when Letters of Call are negotiated.
2. Promotes health and wellness among rostered persons and their families.
3. Fosters a supportive climate for growth through advocacy, modeling by synodical leaders, and direct educational and programmatic offerings.
4. Establishes the process for promoting participation in this system of life-long learning.
5. Reviews, keeps records of rostered leaders' learning covenants and utilizes them in making synodical programmatic decisions and recommendations within the call process.

## Extended Study and Renewal Program

An extended study and renewal period serves to equip both the rostered leader and the congregation or agency for future mission and ministry. It is not a reward for past service. The goals of this period include:

1. The rostered leader pursuing more extensive learning objectives, than would otherwise be possible, that serve both the leader's and the congregation/agency's assessed needs.
2. The rostered leader experiencing renewal and regeneration of vision and vitality.
3. The congregation/agency growing in more fully owning the ministry to which God is calling them.
4. The process providing clarity of goals and mutual roles which may lead to a longer and more fruitful partnership between rostered leader and congregation/agency in mission and ministry.

We recommend an extended study and renewal period of a minimum of one to three months every three to five years in present call. For rostered persons involved in the First Call Theological Education program, this three to five year period begins upon completion of that program. The length and frequency of this period should reflect the ongoing demands placed on the rostered leader, the mutual needs of the leader and congregation/agency, and the available resources. Time during this period shall be used for learning, personal rest and renewal, including attention to health and wellness issues, and preparing for reentry. The rostered person's compensation and benefits, as budgeted, shall continue while she or he is away. The framework for an extended study and renewal period shall adhere to the following:

- Rostered persons and congregations or agencies contemplating extended study should consult with the synodical bishop and synodical guidelines early in the process.\*
- The plan shall be developed in the year prior to its beginning and involve the congregation/agency and colleague group. Proposals for the period are presented to the congregation council or supervisor six months before commencement. The rostered leader agrees to serve with the congregation or agency for at least one year following completion of the period. The congregation or agency assumes essential leadership roles or provides for interim leadership while the

rostered person is away.

- When the period begins, the rostered leader discontinues all leadership roles and personal interaction with members or constituents.
- Within ninety days after the conclusion of the period, the rostered leader reports to the congregation, synodical bishop, and colleague group.
- It is understood that the extended study and renewal period serves as all the continuing education time for that year.

We offer the following examples of possible extended study and renewal periods:

### Example A

1. Length  
One month
2. Eligibility  
Continuous service of three years in the present call.

For rostered persons involved in the First Call Theological Education, this three to five year period begins upon completion of that program.

### Example B

1. Length  
Three Months
2. Eligibility  
Continuous service of three or more years in the present call.

For rostered persons involved in the First Call Theological Education program, this three to five year period begins upon completion of that program.

\*We recommend Bullock, *Sabbatical Planning* (The Alban Institute, No. AL98) as a helpful planning resource.

## Peer Review

"As a church engaged in mission, we believe that life-long learning will best serve the needs of...rostered leaders when there exists an environment in which...the rostered leaders enjoy supportive partnership with their...colleagues." (Envisioning Statement)

### Purpose/Rationale

Peer review offers rich opportunity for disciplined reflection to take place among rostered leaders as they move toward the next state in their personal and vocational development. Participation in this process assumes that these objectives are operative:

1. The circle of accountability for the continuing development of rostered leaders is widened to include colleagues in ministry;
2. The premise of peer service as learning partners within the context of dialogue, collaboration, and support is accented; and
3. A gathering designed to identify needs and goals for continuing development is held.

### Potential Participants

The peer review team consists of three to five rostered leaders chosen by the person being reviewed. Ordinarily, these people have had occasions to interact spiritually and personally with one another as well as to observe each other in ministries.

### Roles of Conversational Coordinator

This person, selected by the rostered leader, is asked to guide the peer review and thereby enable the rostered leader to concentrate more on the feedback given by peers than on group process.

The conversational coordinator will be expected to serve as the convener of the session, set the tone for candid dialogue, keep the discussion focused, ensure that the group adheres to the agenda, and bring the session to closure.

### Recommended Process

As the rostered leader and conversational coordinator plan the session, they will want to outline a proposed agenda for the two hour session. Balanced time should be reserved for focusing on concerns of personhood and leadership. Pertinent materials, including the agenda, can be distributed prior to the session.

A more structured approach could follow a well defined format that incorporates these items; comprehensive overview of past personal and professional activities, on-site observations made by parishioners/constituents, findings gleaned from evaluative surveys and questionnaires, and proposal for future growth.

A less structured approach could follow an informal format characterized by self reporting, low key probing, and open ended suggestions. Regardless of the approach used, the session normally begins with worship and ends with fellowship.

Following the gathering, a summary is prepared by the rostered leader, with copies being mailed to participants and synodical representatives. Entries to be noted include: date, location, agenda, names of participants, climate of the review process, and steps to be undertaken.

## Healthy Leaders/Healthy Church

Healthy Leaders/Healthy Church is a shared project of the Evangelical Lutheran Church in America and the Lutheran Church Missouri Synod, which promotes the physical, spiritual, emotional, interpersonal, vocational, and intellectual health, well-being and wholeness of candidates, rostered leaders and professional church workers, their spouses and families.

There are six program components:

1. Biblical and theological foundations
2. Health promotion
3. Remedial care

4. Communications and networking
5. Research
6. Resource development

A "Ministerial health and Wellness" seminar has been developed that seeks to strengthen and support healthy attitudes and behaviors and change unhealthy attitudes and behaviors. It is a five hour event which utilizes the "Lifestyle Assessment Questionnaire" and helps rostered leaders and their families to identify, explore and act on those life choices that will enhance and strengthen their individual and interpersonal well-being.



Adopted by the ELCA Churchwide Assembly August 16, 1997

## Components for Strengthening Ministry and Mission

Continuing education can be accomplished through workshops, classes, retreats, guided groups, or supervised individual study. Whatever the format, continuing education needs to further the individual's goals for ministry and advance the mission of the church.

Five components provide a structure for continuing education. Although these components are distinguished from one another here for the sake of clarity, in practice they are closely linked together. Involvement in one of these components will normally have an impact on one's understanding of the others. These components function as a guide in planning continuing education. They are also to assist the ELCA's continuing education centers, synods, colleges, and seminaries in offering a full range of continuing education programs and events.

### 1. Biblical Studies and Systematic Theology

Growth in knowledge and articulation of the Christian faith and the Lutheran heritage.

Example: Old Testament, New Testament, Lutheran Confessions, ethics, theology, and worship.

### 2. Personal and Spiritual Growth

Growth in personal and spiritual maturity.

Example: Interpersonal relationships, sexuality, marriage, communication, prayer, spiritual discipline, and devotional literature.

### 3. Skills for Ministry

Growth in leadership and function in ministry.

Example: Administration, time management, conflict utilization, planning, preaching, teaching counseling, visiting, leading worship, clinical pastoral education, and care giving.

### 4. Issues in Church and Society

Growth in reflection and action for ministry in today's world and in relating to other religious traditions.

Examples: Small membership congregations, urban and rural ministry, abortion, AIDS, human rights, racism, world hunger, overpopulation, peace nuclear armament, and ecumenical relationships.

### 5. Development and Assessment of Ministry

Growth in planning for dealing with changes within life and career.

Examples; Call and appointment review, ministry assessment, mobility, transition, ministry goals, and retirement.

Adopted by the Board of Division for Ministry, October 13, 1989.

## State and Current Practices of Continuing Education

The task force reviewed data on continuing education, particularly the 1995 continuing education survey from the ELCA Department of Research and Evaluation. After a review and assessment of continuing education practices in the ELCA, the task force concluded that (1) continuing education needs to be understood more holistically and systemically, and (2) some components need to be added to complement existing strengths.

The data from the 1995 survey of continuing education in the ELCA reveals both strengths and weaknesses. On the one hand, there seems to be growth in rostered leaders' use of time and money for continuing education. On the other hand, there are needs of this church and rostered leaders that are not being adequately addressed. The "state and current practices of continuing education" is neither clear nor uniform across the church. There are many apparent contradictions. Consider the following data:

- From 1990 to 1995, clergy on average used almost one day more per year (total of nearly seven days) for continuing education; they used about three days fewer than the congregation provided (9.5 days). AiMs recorded very little change, but tended to use six of the seven days provided.
- The "Definition" attached to the Letter of Call expects two weeks of continuing education beyond vacation time; yet a 1989 Division for Ministry strategy statement suggested an annual minimum of 25 contact hours.
- Shared planning of continuing education (pastor and congregational leaders) was estimated to be done by 15% of our pastors in 1988; by 1993 some 27.2% had filed a Continuing Education Covenant (introduced by the Growth in Excellence in Ministry project for shared planning by rostered leader/congregation/synod) although 72.5% were doing regular continuing education.
- This church has eight seminaries and 18 continuing education center programs. Many continuing education centers are experiencing severe financial stress; some need to reorganize. Churchwide funding for continuing education programs at centers and seminaries has decreased from \$320,000 in 1988 to \$35,000 in 1996.
- While participation in biblical and systematic theological studies continues as a primary focus, there has been a marked increase in the use of continuing education for ministry skills, particularly worship and evangelism.
- In 1994, over \$8,000,000 was provided for continuing education by pastors, AiMs and congregations an increase of 111% over the \$3,800,000 reported in 1988. This is an increase of \$4,221,200. In this same period, pastoral compensation (salary and housing) increased only 23%.
- Pastors who serve with congregations which plan for and are oriented more to the future than to the past (a vital sign of growing congregations) tend to enjoy supportive lay partnership in continuing education.
- Some 5,300 of nearly 11,000 ELCA congregations have worship attendance of less and 100 per week and can hardly provide for full-time pastoral ministry much less expanded continuing education.
- Over 57% of all pastors now make use of the 8 seminaries and 18 continuing education centers, whose and 18 continuing education centers, whose leaders and faculty are a major resource of this church. Yet, most pastors and other rostered leaders name the synod and churchwide events as the primary setting for their continuing education.

The report of the 1995 survey concludes with some sobering thoughts. The tension between personal and congregational needs highlights some vital questions for continuing education in the future. Should rostered leaders be encouraged to develop their educational goals primarily in response to congregational or agency goals and needs? Should synod or churchwide agenda also be considered a vital factor in developing goals for continuing education in ministry? Or should continuing education continue to be governed by personal goals for enrichment and growth in ministry?

There are also three major churchwide initiatives which must be included in any assessment of the state and practices of continuing education. These initiatives are designed to impact the systems of continuing education in the ELCA for years to come.

### 1990-2000 Growth in Excellence in Ministry

The heart of GEM is shared planning of continuing education using the Continuing Education Covenant. Financial awards promoted this planning process. Focus Resources have been developed to address key congregational ministry needs of this church: multi cultural education, rostered leaders mutual support groups, evangelism and stewardship leadership, transition from one call to another, ministry in daily life. Reports indicate that 10,266 participants used one or more GEM resources in 1995; this is a high proportion of our total leadership roster (active clergy and AiMs) of 14,031.

### 1994 First Call theological Education

The first mandated continuing education in the Evangelical Lutheran Church in America (1995) seeks to assist every newly rostered person with a structured program of continuing theological education during the first three years of public ministry. Newly rostered leaders are helped in three key dimensions; Ministerial identity, Ministry Skills, and Context of

Ministry. Over 900 newly rostered leaders are presently involved in programs developed by synods, multi-synodical committees, and regions. A baseline study has begun which will measure the imperatives: mission outreach and ministry in daily life.

### **1996 Healthy Leaders/Healthy Church**

Healthy Leaders/Healthy Church is a shared project of the ELCA and Lutheran Church-Missouri Synod, which promotes the physical, spiritual, emotional, interpersonal, vocational, and intellectual health, well-being and wholeness of candidates, rostered leaders and professional church workers, their spouse and families. Healthy Leaders/Healthy church has several educational components, including a seminar “Ministerial health and Wellness” which emphasizes “Life-Long Learning and Development”. See Exhibit C for more details.

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Churchwide Assembly Action re: Life Long Learning and Development  
Adopted by the 1997 Churchwide Assembly of the ELCA

To encourage all persons in the Evangelical Lutheran Church to engage in a holistic and systematic approach to life-long learning and development.

- a. For rostered persons this includes:
  1. Specifications:
    - a. A minimum of 50 contact hours per year of intentional continuing education or 150 contact hours each three-year period;
    - b. Spiritual disciplines;
    - c. Habits of personal study;
    - d. Regular worship;
    - e. Self-care;
    - f. Involvement in the wider community;
    - g. Participation in intentional colleague groups; and
    - h. Peer review as appropriate for personal and vocational development.(see “Life-Long Learning and Development for Faithful Leaders,” Exhibit B).
  2. Extended study and renewal of a minimum of one to three months every three to five years in present call. For rostered persons involved in the First-Call Theological Education program, this three-to five-year period begins upon completion of that program. (see “Life-Long Learning and Development for Faithful Leaders,” Exhibit A).
  3. An annual review of continuing education needs and plans with an appropriate group within the congregation or agency and the synod.
- B. For congregations and agencies, this means;
  1. Being in partnership with the rostered person in continuing learning and development;
  2. Utilizing a mutual ministry committee or an appropriate group to review continuing education needs and plans;
  3. Providing an appropriate share of the funding for continuing education and programs of extended study and renewal (growing to a minimum of \$1,000 - \$700 from the congregation or agency and \$300 from the rostered person - by the year A.D. 2000); and
  4. Respecting rostered persons’ needs for appropriate self-care.
- C. For synods, this means;
  1. Communicating expectations regarding intentional learning and development by rostered persons;
  2. Promoting health and wellness among rostered persons and their families;
  3. Fostering a supportive climate for life-long learning and development; and
  4. Reviewing and recording continuing education plans of rostered persons.