

1997 Churchwide Assembly

Evangelical Lutheran Church in America



MAKING CHRIST KNOWN

*Alive in
Our Heritage
and Hope!*

**REPORTS AND RECORDS:
ASSEMBLY MINUTES**

August 14-20, 1997 ! Philadelphia, Pennsylvania

- d. Budget development and funding will be under the primary leadership of the ELCA Foundation, with close support from the Division for Ministry, the Office of the Treasurer, the Office of the Presiding Bishop, and other appropriate units. Initial startup funding will be sought through the Expanded Ministries Fund of the ELCA, and other available sources.
- e. Financial Management, Program Development, Interpretation, etc.: The ongoing management of the fund will be through the ELCA Foundation with close support from the Division for Ministry, seminary development offices, Division for Global Mission, Division for Outreach, Division for Congregational Ministries, Office of the Presiding Bishop, and other related units. A management team will be appointed to plan and manage these activities.
- f. Grants Management: The allocation of grants will be organized and administered through a committee led by the Division for Ministry, including the ELCA Foundation, seminaries, synods, other churchwide units, and others appropriate to the task.

Time Line for Introduction and Start Up

- Spring 1997: The board of the Division for Ministry will propose the establishment of The ELCA Fund for Leaders in Mission to the Church Council for its action.
- Spring 1997: The Church Council will recommend the establishment of The Fund for Leaders in Mission to the 1997 Churchwide Assembly.
- August 1997: The Churchwide Assembly, in connection with the report of the Presiding Bishop's "Initiatives" for the Evangelical Lutheran Church in America, will approve the establishment of The Fund for Leaders in Mission.
- Fall 1997: Appropriate committees will be appointed to accomplish detailed planning to formally begin the fund in 1998.
- Fall 1998: Planning and staffing will be completed and the fund will be initiated in pilot areas, then introduced broadly across this church.

Bishop Anderson, in announcing the vote, affirmed that it was a testimony to those involved in theological education of the commitment of this church to its future leaders.

Life-Long Learning and Development for Faithful Leaders

Reference: *1997 Pre-Assembly Report*, Section IV, pages 109-117.

BACKGROUND

In response to recommendations presented in the report of the Study of Theological Education to the 1993 Churchwide Assembly, the assembly adopted "Life-Long Learning" as one of "eleven imperatives for theological education . . . as the planning and guiding focus for preparation of leaders for this church into the 21st century" [CA93.6.19]. The 1995 Churchwide Assembly received the final report of the Study of Theological Education and adopted a recommendation that included the following directive:

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 this church and rostered persons' needs for ongoing spiritual formation, theological growth, and leadership beyond the first three years under call" [CA95.6.55].

A report was prepared by the Division for Ministry on expectations in regard to life-long learning for ordained ministers, associates in ministry, deaconesses, and diaconal ministers. The Church Council received that report at the council's April 1997 meeting. The council voted:

To transmit to the 1997 Churchwide Assembly the report on "Life-Long Learning and Development for Faithful Leaders" (CC97.4.9).

The Church Council recommends adoption of the following resolution.

RECOMMENDATION OF THE CHURCH COUNCIL

To adopt the following recommendations contained in the document, "Life-Long Learning and Development for Faithful Leaders":

1. To encourage all rostered persons in the Evangelical Lutheran Church in America to engage in a holistic and systematic approach to life-long learning and development.
 - a. For rostered persons, this includes:
 - (1) Specific expectations:
 - (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,” Appendix D).
- (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,” Appendix C).
 - (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.

Pastor Wagner called the assembly’s attention to another outcome of the Study of Theological Education, which was requested by the 1995 Churchwide Assembly, that relates to life-long learning and the development for faithful leaders. Pastor

Behrens then introduced and reviewed the following recommendation of the Church Council:

MOVED;

SECONDED: To encourage all rostered 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,” Appendix D [*Pre-Assembly Report*, Section IV]).
 - (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,” Appendix C [*Pre-Assembly Report*, Section IV]).
 - (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 rostered persons 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 the rostered person’s 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.

Mr. John D. Litke [Metropolitan New York Synod] moved:

MOVED;

SECONDED: To amend the recommendation by striking the word, “rostered,” from the first sentence.

Mr. Litke observed that everyone should be encouraged to engage in life-long learning. He said, “I think it is inconsistent that the one and only fundamental premise out of which the plan grows assumes that only rostered persons will be expected to engage in life-long and systematic learning and development. That should be expected of all of us as leaders—lay or ordained, rostered or not rostered.” Pastor Behrens indicated that the amendment was “very much in spirit” with the overall mission and purpose of the resolution.

The Rev. Ray J. Miller [Western Iowa Synod] asked how much of the resolution would be obligatory? Bishop Anderson indicated that the question was directed to the whole motion and that present discussion was limited to the amendment.

MOVED;

SECONDED;

Yes—743; No—143

CARRIED: To amend the recommendation by striking the word, “rostered,” from the first sentence.

Pastor Miller then reiterated his inquiry, asking, “How much of this is obligatory? How much of it is the person’s own desire to do? If it is obligatory, is there a kind of a provisional ordination if they do not comply? Is there a partial call if they are not in compliance? Would this also apply to anyone who comes into the Lutheran church ministry from other theological seminaries?” Pastor Behrens responded that the provisions only are guidelines and “we then expect the synods and churchwide [organization] and other corporate agencies to provide a climate that will bring this to fruition.” He responded to the final question by saying it would apply.

The Rev. Steven J. Solberg [Northeastern Iowa Synod] spoke in support of the recommendation, but raised a concern that the number of contact hours expected (50 per year) would create problems with respect to family situations and finances, as well as employing agencies. He cited as an example that both he and his wife are rostered, although his wife is now on leave and therefore without call and asked whether thought had been given to people in such situations. Pastor Behrens replied that the assumption of the report was that the guidelines are for people “under call” and that this is not a requirement for those rostered but without call.

The Rev. Donald L. Hunzeker [Nebraska Synod] spoke against the resolution because it would place a hardship on congregations and pastors who live far from centers of education. He noted that much of his continuing education is centered around the needs of the congregation. He also addressed the issue of cost and said, “Congregations are striving more and more to develop their resources just to help their pastors. Pastors in some congregations are having a harder and harder time getting by and I do not think churchwide has that much money yet. I find this is an undue burden on pastors.”

Bishop Robert D. Berg [Northwest Synod of Wisconsin] spoke in favor, saying, “We need to do all we can to encourage continuing education for both clergy and [other] rostered persons and laity.” He noted that the Northwest Synod of Wisconsin has covenanted with neighboring synods regarding first call theological education and that they also have a lay school for ministry. “We are seeing the health and well-being of first-call pastors improving, that those pastors involved in continuing education are being strengthened and renewed in their ministries, and that their lay school graduates come out better equipped to serve along with clergy,” he said.

Ms. Linda K. Walker [New Jersey Synod], an associate in ministry, has served on a synod committee working with Growth in Excellence in Ministry (GEM) funds and said she has been very encouraged with the increased participation in the pastoral and rostered leadership in her synod through the availability of this funding. She asked, “Will there be GEM money available from 1998 to 2000?”

Pastor Behrens replied that the GEM was a ten-year program that will conclude in the year 2000, but that it will be more limited in these final two years of the grant's life. He added that \$11.4 million will have been received by the end of this decade.

Ms. Faith Ashton [North Carolina Synod] spoke in support of the recommendation, stating that she was surprised that pastors are not required to complete continuing education, "because many of us are so required to continue in our jobs." She added that with the communications of today one can find the means, even in rural areas, to find alternate routes to continuing education.

Mr. Phillip Schmidt [Northeastern Ohio Synod] spoke in support of the recommendation, noting that he was sensitive to the need for continuing education for ELCA pastors. He added that Trinity Lutheran Seminary has a program of interactive education "and I would like to encourage all of the seminaries to look into the opportunities that [the] World Wide Web and the Internet provide for this kind of education to our rostered people."

The Rev. Robert S. Jones [South Dakota Synod] spoke in support of the recommendation. He said that he was granted a sabbatical in summer 1996 and that guidelines provided by the synod were invaluable in developing a partnership between him as pastor and the congregational leadership. He said that it would be helpful now to have the guidelines in this action before the assembly distributed throughout this church.

Ms. Carole M. Silvoy [Northeastern Pennsylvania Synod] identified herself as an associate in ministry and inquired about who will oversee the institutions and agencies of this church and encourage the use of such guidelines. Pastor Wagner responded that staff members of the Division for Ministry "work with the Division for Church in Society [regarding other institutions] which has a staff person who works directly on the institutional side of supporting ministries and so we do have access We try to inform them and to work with their good will around these kinds of issues."

Ms. Annette C. Crickenberger [Eastern North Dakota Synod] asked for clarification about extended study and funds. Pastor Behrens explained that the recommendation called for a one- to three-month sabbatical every three to five years, whereas the old guideline was every five to seven years. He also noted that the recommendation calls for 50 contact hours but that the definition of contact hours has been modified.

The Rev. Waldemar E. Meyer Jr. [Florida-Bahamas Synod] suggested that congregations will need to consider the tax ramifications while implementing these guidelines.

The Rev. Synde Manion [Southern California (West) Synod] moved:

MOVED;

SECONDED: To amend the last line [c.(4),] by deleting the words, "reviewing and," and inserting the words, "the receipt of," after the word, "Recording," so that the sentence would read, "Recording the receipt of continuing education plans of rostered persons."

Pastor Manion indicated that she serves as chair of her synod's board for rostered personnel and commented, "There is discussion in here about encouraging conversation with colleagues as well as having conversations with mutual ministry committees. I do not think we have to have our synod staffs reviewing all the continuing education plans of all the rostered leaders of this church . . . ; it is another level of bureaucracy that we do not need." Bishop John Beem spoke against the proposed amendment and in support of retaining the word, "reviewing," because he felt obligation for "some oversight instead of just receiving a report and recording it."

The Rev. Alan K. Hanson [Nebraska Synod] spoke in support of the amendment, noting that to have the rostered persons submit a plan to their synod in writing for recording and filing rather than to have synod staff review each one would be adequate.

The Rev. Adrian J. Shearer [Upper Susquehanna Synod] clarified that the proposed amendment pertained to section c.(4) of the resolution.

Bishop Lee M. Miller [Upstate New York] spoke against the amendment, affirming that the review is particularly important and that such review already is done in his synod, so that synodical bishops may help to identify funding sources and participate in decisions about continuing education.

MOVED;

SECONDED;

Yes—370; No—574

DEFEATED: To amend the last line [c.(4)] by deleting the words, "reviewing and," and inserting the words, "the receipt of," after the word, "Recording," so that the sentence would read, "Recording the receipt of continuing education plans of rostered persons."

Mr. Larry D. Moeller [Sierra Pacific Synod] spoke in support of the original resolution and encouraged promotion of its provisions in "Seeds for the Parish" so the lay leaders and mutual ministry committees in congregations are made aware of continuing education possibilities that may be helpful for the congregational needs and could be suggested to the rostered leadership of the congregation.

Ms. Dorothy Norman [Southeastern Minnesota Synod] endorsed the concept of life-long learning, but wondered whether an extended sabbatical every three to

five years would be possible for many congregations. She suggested the following amendment:

MOVED;

SECONDED: To amend the recommendation of the Church Council by replacing in line three of section a.(2), the words, “three to five years” with the words, “five to seven years.”

Bishop Beem indicated that it was because of the mobility of rostered staff, who move on an average of between every four and five years, that the Division for Ministry recommended the change from five to seven years to “an extended study of from one to three months” after three to five years. He also said that denominations that have been in the business of sabbatical leaves or extended study leaves for 15 to 20 years have found that the tenure of pastors in their congregations has lengthened.

MOVED;

SECONDED; Yes—356; No—573

DEFEATED: To amend the recommendation of the Church Council by replacing in line three of section a.(2), the words, “three to five years” with the words, “five to seven years.”

The Rev. Raymond C. Hittinger [Northeastern Pennsylvania Synod] stated that he serves fulltime in interim ministries and said, “I am never in one place more than about 18 to 20 months. By that [requirement of the guidelines], I would never get enough time to ever get released time for education.” He said he only asked that situations such as his be considered as the plans for continuing education are developed.

The Rev. Herbert C. Spomer [Lower Susquehanna Synod] observed that it may not always be obstacles of finances or time constraints but “it could be a lack of focus . . . and some could very well benefit from mentoring.” He observed that “there are glimmers of this [idea] here [in the resolution] but it is not spelled out too well. Perhaps that part of it could be ‘beefed up.’”

Mr. William E. Diehl [Northeastern Pennsylvania Synod] inquired about the implications of moving to service in a different denomination. Pastor Wagner responded, “We have just begun to have some conversations around those sorts of issues with representatives of other denominations, but all of that is on hold pending the action of this assembly. The general principle we have talked about is that if a person on the roster of one church is approved by the second church to provide ministerial services in that second denomination, according to the standards of that

denomination the pastor or lay worker would be bound by the policies that are extant in that denomination, that is, the second denomination.”

The Rev. Thomas J. Wagner [South-Central Synod of Wisconsin] called the question.

MOVED;

Two-Thirds Vote Required

SECONDED;

Yes—853; No—66

CARRIED: To move the previous question.

ASSEMBLY

ACTION

Yes—864; No—91

CA97.2.7 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,” Appendix D [*Pre-Assembly Report*, Section IV]).

(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,” Appendix C [Pre-Assembly Report, Section IV]).

(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 rostered persons 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 the rostered person’s 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.

Life-Long Learning and Development for Faithful Leaders

Introduction

The 1995 Churchwide Assembly voted “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” [CA95.6.55].

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 (Appendix A).

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 that prompted the 1995 resolution, including:

1. clergy morale and well-being, amid reports of burn-out, sexual abuse, substance abuse, incompetence;
2. median length of call only five years;
3. insecure status and financial constraints of our continuing education providers, both seminaries and continuing education centers;
4. 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;
5. lack of documented partnership of clergy and other rostered persons with congregation or agency leaders in planning continuing education (37 percent of clergy filing a Continuing Education Covenant);
6. 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;
7. congregations and rostered leaders who look inward with survival goals rather than looking outward with mission goals;
8. 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, and churchwide organization) and *holistic* (affecting the spiritual, physical, emotional, social, interpersonal, vocational, and intellectual well-being of rostered leaders).

An Envisioning Statement

The report of the Division for Ministry 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. Therefore, this church envisions:

1. The engagement of all the baptized in learning and growing together in mission and ministry;
2. An ethic that 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.

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 is 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, and 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, and attention to emotional and interpersonal health (see Appendix B); and
 - f. involvement beyond the congregation, agency, or other employing entity 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 Appendix C and D).
 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.
 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. The rostered person exists, however, 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, agency, or other entity 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, and peers.
5. Participates in an intentional colleague group.

Congregation, Agency, or Other Entity

1. Calls rostered leaders with the expectation that both congregation, agency or other entity, and the 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 or agency leaders.

Synod (in partnership with region and churchwide organization)

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.

In Regard to Recommendations to the 1997 Churchwide Assembly

Current guidelines and expectations concerning continuing education in the Evangelical Lutheran Church in America include the following:

1. Theological education prepares and equips faithful leaders to fulfill God's mission.
2. This church encourages rostered leaders continually to develop and renew their gifts for ministry through disciplined patterns of life-long learning.
3. All newly rostered leaders participate in First-Call Theological Education, including colleague groups or mentoring pairs.
4. For rostered leaders beyond first call, this church expects:
 - a. an annual or updated learning agreement developed in partnership with congregation or agency leaders and reported to the synod;
 - b. twenty-five contact hours per year for continuing theological education;
 - c. an \$800 minimum annual financial support (\$550 from congregation or agency, \$250 from rostered leader); and
 - d. extended study of one to three months after five to seven years in the present call.

Continuing education includes ongoing spiritual formation, theological growth, and leadership development. The following recommendations address these issues, but expand "continuing education" to include rostered leaders' needs for support, healthy lifestyle, and candid feedback. Expansion of current expectations must also take into account the systemic and holistic vision called for by "recommendations that serve both the church and rostered persons' needs. . . ."

The following persons served on the Beyond First-Call Theological Education Task Force: William C. Behrens, chair, Robert C. Barger, John C. Beem, Richard P. Carlson, John Davis, Joan M. Duke, Marilyn Hetzler, Arland D. Jacobson, Jill E. James, Bruce D. Johnston, Connie Leean-Seraphine, Neva A. Warren.

Appendix A

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.

In attempting systemically to be aware and holistic, the task force considered many concepts of continuing education (leadership education, leadership development, theological reflection, skill training, critical thinking, systems thinking, and other combinations. While the task force affirms the vision of life-long learning and development, it was assigned the task of assessing *continuing education*, which is defined by the Division for Ministry as “an intentional activity with colleagues, building on previous learning, which strengthens current ministry and empowers one for future service.” Its components are (1) biblical and systematic theology, (2) personal and spiritual growth, (3) ministry skills, (4) church and society issues, (5) ministry assessment and development. A continuing education contact hour is defined as 50 minutes of educational activity to meet the goals of a program.

The data from the 1995 survey of continuing education in the Evangelical Lutheran Church in America 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:

1. From 1990 to 1995, clergy on average used almost one day more per year (total of nearly seven days) for continuing education; yet they used about three days fewer than the congregation provided (9.5 days). Associates in ministry recorded very little change, but tended to use six of the seven days provided.
2. The “Definition” document related 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.

3. Shared planning of continuing education (pastor and congregational leaders) was estimated to be done by 15 percent of our pastors in 1988; by 1993 some 37.2 percent 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 percent were doing regular continuing education.
4. 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.
5. While participation in biblical and systematic theological studies continues as a primary focus, a marked increase is noted in the use of continuing education for ministry skills, particularly worship and evangelism.
6. In 1994, more than \$8,000,000 was provided for continuing education by pastors, associates in ministry, and congregations) an increase of 111 percent over the \$3,800,800 reported in 1988. This is an increase of \$4,221,200. In this same period, pastoral compensation (salary and housing) increased only 23 percent.
7. Pastors who serve with congregations that 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.
8. Some 5,300 of nearly 11,000 ELCA congregations have worship attendance of less than 100 per week and can hardly provide for full-time pastoral ministry, much less, expanded continuing education.
9. About 57 percent of all pastors now make use of the eight seminaries 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? What influence will First-Call Theological Education (as mandated by the 1995 Churchwide Assembly) have on the practice of continuing education?”

Three major churchwide initiatives 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 Evangelical Lutheran Church in America for years to come.

1990-2000 Growth in Excellence in Ministry

The heart of Growth in Excellence in Ministry (GEM) is shared planning of continuing education. Financial awards promoted this planning process. Focus resources have been developed to address key congregational ministry needs of this church) multicultural education, rostered leaders mutual support groups, evangelism and stewardship leadership, transition from one call to another, and 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, associates in ministry, deaconesses, and diaconal) of 13,512.

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 (especially religious leadership roles), Ministry Skills, and Context of Ministry. More than 900 newly rostered leaders are presently involved in programs developed by synods, multi-synodical committees, and regions. A baseline study has begun that will measure the impact of First-Call Theological Education on ministerial leadership in relation to two of the theological education imperatives: mission outreach and ministry in daily life.

1996—Healthy Leaders and Healthy Church

Healthy Leaders and 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 spouse and families. Healthy Leaders and Healthy Church has several educational components, including a seminar “Ministerial Health and Wellness,” which emphasizes “Life-Long Learning and Development.”

These three initiatives are now being evaluated, but it is too soon to determine how they will affect “the state and current practices of continuing education.” They do address the issue of continuing education designed to serve both the needs of the church and of rostered persons.

This church places a high value on continuing education for its rostered leaders. This continuing education is not merely a private matter for personal and

professional growth, but is planned and carried out collaboratively, for the sake of God’s mission. At the same time, continuing education which “serves both the church and rostered persons’ needs” is part of a larger concern that includes the health and well-being of all our rostered leaders.

Appendix B

Healthy Leaders and Healthy Church

Healthy Leaders and 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; and
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 that utilizes the “Life-style 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.

Appendix C

Extended Study and Renewal Period

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 or agency’s assessed needs.
2. The rostered leader experiencing renewal and regeneration of vision and vitality.

3. The congregation or 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 or 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 or 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:

1. Rostered persons and congregations or agencies contemplating extended study should consult with the synodical bishop and synodical guidelines early in the process. [We recommend Bullock, *Sabbatical Planning* (The Alban Institute, No. AL98) as a helpful planning resource.]
2. The plan shall be developed in the year prior to its beginning and involve the congregation or 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.
3. When the period begins, the rostered leader discontinues all leadership roles and personal interaction with members or constituents.
4. Within 90 days after the conclusion of the period, the rostered leader reports to the congregation, synodical bishop, and colleague group.
5. 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 program, 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.

Appendix D

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 and Rationale

Peer review offers rich opportunity for disciplined reflection to take place among rostered leaders as they move toward the next stage 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 peers serving 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 or constituents, findings gleaned from evaluative surveys and questionnaires, and a 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.

Report of the Treasurer (and Mission Investment Fund)

Reference: *1997 Pre-Assembly Report*, Section II, pages 41-81.

Bishop Anderson called on Mr. Richard L. McAuliffe, treasurer of the Evangelical Lutheran Church in America, to present his report. Using figures projected on the video screens, Mr. McAuliffe noted that there was an excess of revenue over expense in both the 1995 and 1996 fiscal years, saying that this excess has provided modest cash reserves which “give us the flexibility to support new mission opportunities and to deal with emergencies without reducing other programs. In addition, modest reserves allow us to continue to avoid paying interest on borrowed funds during seasonal declines in income.” He also reported, “Because of the increased revenue in 1996, including support from individuals, congregations, and synods, additional funds were provided for projects not included in the operating budget. Projects include a new congregation start and a redevelopment in Florida, resources for training in Christian education, a contemporary worship guide, a growing congregation grant, and special projects in Ethiopia, Namibia, Cameroon, Chile, Ghana, Nigeria, India, and Russia.”

Mr. McAuliffe pointed out that of the \$35 million increase in giving by individuals to congregations last year, \$33.5 million was utilized by congregations for operations, building repairs, improvements, local benevolence, and other miscellaneous expense; \$1.5 million of those dollars were passed on to the 65

ELCA synods and the churchwide organization. He commented, “Contributions to the ELCA World Hunger Appeal totaled \$11.8 million in 1996, a modest decrease of some \$200,000 from 1995. In addition, \$1.2 million was received in disaster relief funds in 1996.”

He asked, “How are we doing in fiscal 1997?” and answered that in the first five months of the 1997 fiscal year revenue has been about the same as forecast. Even though mission support has increased by about \$266,000 since the 1996 five-month period, total revenue was down mostly because of a decrease in bequests received. Expenditures have been within budget. World Hunger Program receipts so far in 1997 have been \$3.1 million, up \$100,000 from 1996. Receipts for ELCA Disaster Relief for 1997 now approximates \$1.9 million with Upper-Midwest flood relief being the major designee. In conclusion, Mr. McAuliffe observed, “If I were asked to summarize my personal feeling about the financial status of the churchwide organization, I would use the words ‘stable and improving.’”