



Mountain Desert District Unitarian Universalist Association

2242 South Albion Street Denver, CO 80222
303-726-9676 executive@mdduua.org www.uua.org/mdd

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Rev. Barbara Merritt, Chair
UUA Panel on Theological Education
25 Beacon Street
Boston, MA 02108

Friends in Faith,

Please find attached our proposal, *Nurturing Excellence in Transformational Minister*. It outlines a structured curriculum for enhancing formation and the development of excellence in ministry for Unitarian Universalist students at The Iliff School of Theology, Denver, Colorado, a liberal, non-UU theological school.

We propose broadening the curriculum for theological education and ministerial formation by addressing ministerial competencies that are not addressed by Iliff, but which are critical to ministerial excellence. These include church administration, emotional systems thinking, congregational studies, Unitarian Universalist theology, UUMA professional ethics, etc. This program will be offered in cooperation with and for the mutual benefit of the Unitarian Universalist congregations in the Boulder-Denver Cluster. Bringing our eight congregations into closer relationship, this program will provide learning opportunities for ministerial formation through study, reflection, and dialogue among lay leaders, settled ministers, students, and ministerial interns. It will also enhance the ongoing education and development of ministers in preliminary fellowship and ordained clergy transferring to Unitarian Universalism from other faith traditions, as well as providing a discernment process for lay people considering ordained ministry.

This model for broadening the curriculum of theological education and ministerial development could be replicated by clusters of Unitarian Universalist congregations in other metropolitan areas with non-UU theological schools, based upon their specific context.

With excellence in ministry as our shared goal, the various, interrelated parts of Unitarian Universalist ministerial formation (e.g., theological education, ministerial internships, continuing education in preliminary fellowship, etc.) will be integrated and enhanced using a shared praxis model.

True to our Unitarian Universalist relational theology, this proposal has been developed using a covenantal approach. We have been in conversation with the various constituencies within our local Unitarian Universalist community, and have developed this proposal in partnership with the Boulder Denver Cluster of Congregations, the Front Range chapter of the Unitarian Universalist Ministers' Association, the Iliff School of Theology, and our Unitarian Universalist students who are enrolled there.

In partnership,

Nancy Bowen, District Executive

Grant Proposal to the UUA Panel on Theological Education

Title: Nurturing Excellence in Transformational Ministry

Location: Boulder Denver region working with Iliff School of Theology

Anticipated Impact

Students involved over 4 years: up to 25 different students
Ministers involved over 4 years: up to 8 ministers in final fellowship
4 ministers in preliminary fellowship
4 ministers transferring into UU fellowship
Up to 40 lay leaders

Contact Information: Rev. Nancy Bowen, District Executive
2242 South Albion Street
Denver, CO 80222
303-726-9676

An Understanding of Excellence in Transformational Ministry

Many of us have discussed what excellence in ministry requires, what the many faces of excellence look like in varying congregational, educational, and community contexts, but no one as far as we know has articulated a definition of excellence in ministry. For our purpose, excellence in transformational ministry is capable and committed to the increasing health, vitality, and spiritual depth of our congregations and our tradition. Vocational leadership is foundational to ministry, and as such, leadership development is inherent in all areas of ministerial excellence. Excellence requires the ability to articulate and carry the vision, lead cultural and institutional change, deepen congregational life, connect with the community in powerful ways, nurture the beloved community, encourage generosity, reinforce healthy patterns and practices, and reinvent one's ministry in response to changing congregational need and context. The tools for transformation include preaching, teaching, pastoral care, prophetic witness, administration, and strong interpersonal skills. While a theological school provides the academic grounding for transformational ministry, it is not sufficient. Unitarian Universalist ministers and congregations, given our covenantal theology, must provide formative experiences to assist students in obtaining the additional knowledge and skills for excellence in transformational ministry.

Statement of the Current Situation

There are about 350 people preparing for ministerial fellowship with the Unitarian Universalist Association, and 65% are from 70 theological schools other than Meadville Lombard or Starr King.¹ This requires an examination of Unitarian Universalist ministerial formation at non-UU schools.

The Iliff School of Theology is “a graduate theological school of the United Methodist Church. Its central mission is the education of persons for effective ministry in Christian churches and other religious communities, for academic leadership, and for the cultivation of justice and peace in local and global contexts.”(*the Iliff Mission Statement 2006*) Iliff is an active partner in this proposal and is seeking further grant funding to assist with Unitarian Universalist courses.

Iliff offers six degree programs (Mdiv, MA, MASM, MTS, DMin. and Ph.D.) to its 300 students. While a United Methodist seminary, Iliff now serves over 30 faith traditions, has always welcomed Unitarian Universalist students, and has had longstanding, close relations with some UU congregations (e.g., First Universalist Church). The number of Unitarian Universalist students in the MDiv program has increased over the past seven years. Currently, 12 UU students are enrolled the MDiv program and three more students are scheduled to start their studies in Fall 2008.

1 David Pettee, *Ministerial Credentialing Snapshot*, (in *The Religious Leader*, Winter 2008)

Eight Unitarian Universalist congregations form the Boulder-Denver Cluster. This cluster is in place and was intentionally formed. Its leadership body includes lay leaders, ministers, musicians, religious educators, and our youth. Its vision is to have Unitarian Universalism well-known and recognized as an agent of transformational change along Colorado's Front Range. A few of the ways the cluster is manifesting this vision are: holding a performance of the *Sources Cantata*, organizing a UU presence at Pride Fest, developing coordinated social justice programs, and supporting religious educators, ministers, and musicians as they meet for support and to share best practices.

A Unitarian Universalist *Ministerial Liaison* funded by a grant from the St. Lawrence Foundation meets regularly with the Unitarian Universalist students at Iliff for discussion of issues of personal and professional formation within our faith context. The liaison has implemented a Professional Advisor program that pairs each student with a minister advisor. The Ministerial Liaison also works with the Unitarian Universalist Student Group at Iliff.

Unitarian Universalist Polity (BX 2410) and *Unitarian Universalist History (BX 2413)* are offered on an alternating basis with one course offered each academic year. In 2007-2008, UU Polity was offered, and UU History will be offered in 2008-2009. These courses are taught by local Unitarian Universalist clergy. A stipend has been paid for these courses through grants and assistance from the UUA Ministry and Professional Leadership. This spring a course on Unitarian Universalist Religious Education will be offered by Katie Tweedie Erslev, author of *Full Circle: Fifteen Ways to Grow Lifelong UUs*, and *Traditions with a Wink: UU Identity for 6/7/8th grades*.

Conceptual Framework for Proposal

Our proposal is informed by the work of Maria Harris (e.g., the congregation as curriculum), Thomas Groome (e.g., shared praxis model), Peter Senge (e.g., learning organizations), and Parker Palmer (e.g., the undivided life). We will create a powerful learning community grounded in congregational life that uses the shared praxis model of action-reflection. By bringing ministerial students into dialogue with congregational leaders and ministers on topics of mutual interest and concern, we expect to strengthen leadership in our congregations at all levels. The curriculum includes structured learning and formation opportunities with the eight UU congregations in the Boulder Denver Cluster. By combining theory with the practical experiences of lay leaders and ministers, this program will engage students in real world dialogue about and reflection on transformational ministry.

Thomas Groome's (1980) shared praxis approach engages the whole person. It invites the integration of one's previous experience into the present situation. More than an exercise in cognitive learning, the Shared Praxis Model includes:

- 1) reflecting on present events,
- 2) reflecting on factors that lead to the present situation,
- 3) seeing one's experience in light of one's vision of faith,
- 4) examining experience in light of what should be and what actually is,
- 5) making a decision for further action.

The model emphasizes critical self-reflection by inviting individuals and groups to explore experiences using a praxis model, rather than simply focusing on theory. Students will deepen shared praxis by developing an electronic portfolio of work products (e.g., written reflections, academic papers, sermons, etc.). The portfolio can be shared with peers, advisors, presenters, ministers, and lay leaders to facilitate dialogue and feedback. It will also be a vehicle for individual reflection on changes in learning, perspective, and leadership over time.

Parker Palmer's concept of an "undivided life" is an important foundation for ministerial health and vitality. By remaining connected with the passion that led to ministry, one is better able to sustain energy for the vision and motivation for the countless reinventions of ministry required in a long career. Modeling an undivided life means wrapping one's life around the question: "How do I stay close to the passions and

commitments that took me into this work, challenging myself and my colleagues and the institution I work in to keep faith with this profession's deepest values?"²

Drawing on the concept of shared ministry³, this program provides experiences in which ministers, lay leaders, ministerial interns, and theological students learn together. Ministry whether lay or ordained, is vocational leadership. By engaging in this model, ministerial candidates and their sponsoring congregations will be able to enrich one another's ministry. This model also provides a discernment process for lay leaders considering ordained ministry. The Rev. Gordon B. McKeeman has written, "Ministry is a quality of relationship between and among human beings that beckons forth hidden possibilities." As ministry happens in the relational space among people, no matter their roles, this program will enhance the faith development and spiritual formation of all who participate.

Theological Context for Proposal

Learning communities are an old model made new again. In the 1648 Cambridge Platform, congregations agreed to honor the autonomy of each church, while also pledging their mutual support. In this way, the spiritual formation of ministers, individuals, and congregations was supported within the community of congregations. Theological students often "read with a colleague" as a fundamental part of their preparation for pastoral ministry. Grounded in our tradition and challenged by the desire for transformational ministry, Unitarian Universalist congregations are called into a covenantal relationship of support and learning in the 21st century to foster excellence in ministry.

Recognizing the limitations of radical individuality, we are inspired by what may be seen as a contemporary version of this covenant to study together across all the boundaries that could divide us. Rebecca Parker reminds us that we are always stepping into an existing covenant when we become Unitarian Universalists, when we change congregations, when we move from laity to ordained leadership. This is reflected in the hymn phrase, "what they dreamed be ours to do". Each of us is challenged to accept the discipline of practicing covenant as a guiding value. This learning community provides a context for new ministers to experience preliminary fellowship as a rich and rewarding extension of their education. Our community ministers will bring their unique experiences to this model and will participate in all aspects of the plan. The ministerial colleagues serving in various roles around Iiff accept this challenge and embrace ministerial students and lay leaders in a powerful learning community for transformational ministry in Unitarian Universalist communities.

Growing out of the covenant of beloved community, justice work is intrinsic to this model, and throughout the plan there will be a focus on how to integrate this work into the life of the congregation.

Goals of Nurturing Excellence in Transformational Ministry

- Enhancing theological education to support the success of Unitarian Universalist students at non-UU schools
- Developing ministerial and lay leadership for the benefit of our congregations and the larger community
- Guiding students in a discernment process to focus and sustain effective learning and formation during the fellowshiping process: academy, clinical pastoral education, career assessment, Regional Subcommittee on Candidacy, candidacy, internship, Ministerial Fellowship Committee, and preliminary fellowship
- Providing a structured forum for reflection and planning in all stages of the fellowshiping process
- Creating a learning community of ordained ministers, lay leaders, and students within our eight congregations in the Boulder Denver Cluster
- Equipping students with more "tools" to take into their internship experiences
- Clarifying internship learning goals within a discernment community

2 Parker Palmer, *Professionals who Care: Heart at Work* (in *The Christian Century*, Oct 2., 2007)

3 Barbara Child, ed. *The Shared Ministry Sourcebook: Resources for Clergy and Laity Ministering Together in Unitarian Universalist Congregations* (Boston: Unitarian Universalist Association, 1996)

- Ensuring that students' course selection and academic preparation is relevant to the realities of Unitarian Universalist ministry
- Offering students at non-UU theological schools a Unitarian Universalist ministerial context in which to ground their theological studies
- Introducing the portfolio model into ministerial formation
- Raising congregational awareness of candidacy, sponsorship, and internship responsibilities.
- Creating a discernment path for lay leaders who are considering ordained ministry
- Sharing this program with UU ministers and congregations in other metropolitan areas with non-UU theological schools and providing consultation to support development of similar programs

Anticipated Outcomes

- The eight congregations will invest in the education and formation of Unitarian Universalist ministers
- Prospective UU theological students will choose Iliff to take advantage of this program
- Students meeting with the Ministerial Fellowship Committee will be well prepared
- Congregations co-create the kind of ministerial leaders with whom they want to partner
- Effective mentoring in collegial relationships
- Increased effectiveness in the internship experience, for both students and congregations
- Our leadership will further develop strategies for leading change
- Students will develop a continuing education plan for preliminary fellowship tailored to both their ministerial specialty and their unique interests and needs.
- Settled ministers will continue their professional development
- Clergy ordained in other faith traditions will further develop their Unitarian Universalist ministerial formation as they pursue fellowship
- Other congregational clusters near non-Unitarian Universalist theological schools will replicate this program
- Participants will be inspired to life-long learning as a foundation of excellence in ministry

Opportunities to enhance theological education

As this model is grounded in shared praxis, we will promote the use of electronic portfolios as an approach to enhanced learning among participants. This will encourage an awareness of changes in learning, perspective, and leadership over time. It will also guide students in creating fellowshiping documents they will need as they prepare for internships, meeting the Ministerial Fellowship Committee, and the ministerial search process.

The following learning opportunities (e.g., courses, workshops, conversations, and weekend intensives) have been informed by input from Front Range UU Ministers and the UU students at Iliff. These are designed to provide essential formation opportunities for participants. While participation in any or all of the events is voluntary, we expect that participation will be high because of the relevance and value of the events. These will enhance academic preparation with theoretical perspectives and practical skills that many deem necessary for successful ministry, and which we consider crucial to transformational ministry. These learning opportunities were selected mindful of the unique strengths of the Iliff School of Theology (e.g., pastoral care and social justice). The unique academic program at another theological school would invite a different constellation of enhancements to facilitate excellence in transformational ministry. This model could also be adapted by clusters of congregations surrounding UU theological schools.

Iliff has agreed to offer credit for several weekend intensives as noted in the chart below and will pay a stipend to the presenter and provide space at the school. Unitarian Universalist students will be encouraged to take these courses pass/fail and to pursue their own interests within the topic. These opportunities, taught from a Unitarian Universalist perspective, will be open to all Iliff students. Local colleagues will also develop an extensive annotated bibliography on ministerial and congregational competencies (e.g., worship, leadership, church administration, stewardship, etc.) that will provide the

Unitarian Universalist community with a quick reference to professional resources found to be most helpful.

These learning opportunities will be scheduled in a four-year rotation designed to maximize the potential for effective student participation. Each event will support the overall development and deepening of an inclusive learning community. The development of ministerial authority, presence, and transformational leadership will be integral to each event. While all events have a content focus, skill development and relational learning are essential aspects of the plan as a whole.

Unitarian Universalist students at Iliff have contributed to this proposal by participating in a survey to determine what would most enhance their Iliff education. Seven of twelve students responded. The priorities they identified are: preparing for the Ministerial Fellowship Committee, search support, preliminary fellowship support, and utilizing the internship. They indicated that they regard leadership, conflict management, and group process as critical areas of focus. The areas they would most like help in are social justice, change dynamics, and professional guidelines. See Appendix A for the survey results.

Scope and Sequence of Learning Opportunities Utilizing a Four Year Cycle

Year offered	Event	Description
Every year Format: Open to:	Annual meet/greet orientation for new UU students at Iliff. Emphasis on creating e-portfolio (See Appendix B) ½ day, with lunch included Students no credit	<ul style="list-style-type: none"> ● Local UU ministers and senior Iliff students will help new students identify the critical elements in their theological education. ● Guidance on how to translate and interpret courses for a UU identity. ● Students will gain sufficient information to plan an ideal course sequence. ● Develop awareness of fellowship requirements.
On-going Format: Open to:	Conversations between various colleagues and students once a month during 8 months of the year. Lunch at Iliff community meal Students	Topics to include: Preaching from daily life, Personal spiritual practices, Partners and children in the church, Current issues in polity, Current issues in UUA, Ministerial functions, CPE options, Interfaith work, Rites of Passage
Every year Format: Open to:	Fellowshipping stages ½ day Saturday Students	Preparation, debrief and response planning around Career Assessment, RSCC, CPE, Internships, MFC
Every year Format: Open to:	Maximizing your Internship Experience Using an internship workbook (see Appendix C) day long Saturday Students, internship committees, supervising ministers	<ul style="list-style-type: none"> ● How to work effectively with an Internship Committee. ● Identifying your learning goals for the internship ● Maximizing the learning benefits of the supervisory relationship

Year offered	Event	Description
Every year Format: Open to:	Historical themes in Unitarian Universalist theology day long Saturday Students and lay leaders	<ul style="list-style-type: none"> ● Basic UU theologies ● Focus on writing a systematics paper
Years 1 & 3 Format: Open to:	Unitarian Universalist History liff course 2-3 credits Students, religious educators and lay leaders	Taught by local Unitarian Universalist ministers
Years 1 & 3 Length will vary. Open to:	Anti-Racism, Anti-Oppression, Multiculturalism Training Students, lay people, ministers no credit	The Front Range UUMA cluster will sponsor regular events on anti-oppression. Currently an event is being discussed for January 2009. Issues of anti-oppression will be woven throughout this curriculum.
Years 1 & 3 Format: Open to:	Casing a Church: Congregational Studies and an effective internship Saturday Students, search committees	Led by colleague network. Following <i>Studying Congregations: A New Handbook</i> , Ammerman, Carroll, Dudley and McKinney, 1998 Congregational theology, culture, ecology, identity and process. Developing the capacity to enter a congregation and quickly become an effective learner and leader. Working within staff teams.
Years 2 & 4 Format: Open to:	Unitarian Universalist Polity liff course 2-3 credits Students, Religious educators and lay leaders	Taught by local Unitarian Universalist ministers
Years 2 & 4 Format: Open to:	Unitarian Universalist Religious Education liff course 2 credits Students, lay leaders and DREs	Taught by Katie Erslev Tweedie, DRE Philosophy of religious education, worship with youth, anti-oppression work, professional leadership working relationships.
Years 2 & 4 Format: Open to:	Casing a Church: A well informed search process ½ day Saturday Students, search committees	Led by colleague network
Year 1 Format: Open to:	Issues of Church Staff Finance Weekend Intensive 1 credit liff community and UU community	Led by Rev. Ralph Mero, UUA Financial information and planning for congregational ministers.
Year 2	Issues in UU Professional Ethics	Review of the UUMA Guidelines with a look at the day to day practice of

Year offered	Event	Description
Format: Open to:	Saturday workshop Students	collegiality. Case studies to highlight the significant and often hidden temptations of ministerial authority.
Year 2	Non-violent Communications	An exploration and training in Compassionate Communication modeled on Marshall Rosenberg's work. For personal use and congregational applications.
Format: Open to:	Weekend intensive 1 credit UU and Iliff community	
Year 3	Healthy Congregations: Emotional Systems Theory for UU Leaders	20 hours of training and experience with Emotional Systems thinking in congregational life. Topics include: leadership, mission/vision, conflict, compassionate helping, and identity.
Format: Open to:	Weekend Intensive 1 credit UU and Iliff community	
Year 3	Plan for continuing education during preliminary fellowship	Led by colleague network. Accountability; declaration of intent, meeting specializing requirements
Format: Open to:	½ day Saturday Students and ministers in preliminary fellowship	
Year 4	Generosity and Stewardship	Presentation on the core issues of generosity and stewardship of resources in congregational life. Exposure to resources and case studies on building a generous congregation across all areas.
Format: Open to:	Saturday workshop Students and lay leaders	
Year 4	Unitarian Universalist Worship Design; multi-arts	Taught by Rev. Michael Corrigan Meaningful worship using 21 st century technology; focusing on ritual, music, art, multi-media, geography of space, multi-voiced sermons
Format: Open to:	½ day Saturday Students, lay leaders, ministers	

Accountability

In order to monitor the effectiveness of this model, an outside evaluation component will be included from the beginning, and funding for this will be written into the budget. In addition, a small steering committee drawn from the local Unitarian Universalist community will develop criteria for presentations, recruit colleagues, and supervise ongoing evaluation by participants.

Anticipated Budget for a Sustainable Program

This four-year model develops over time with new workshops and intensives presented each year as student need arises and the academic strength of Iliff shifts. We think that sustainability depends on a paid project coordinator with accountability to MDD, UUMA, congregations and students. The first full cycle will be the most demanding with recruitment, arrangements, communication and evaluation being created fresh. Future years may require less coordination as the program becomes part of the culture. We are confident that other funding sources can be found if the St. Lawrence grant is not renewed.

Budget Request for Academic Year 2008-09

Budget Item	Panel Request	Iliff Request to St. Lawrence	Other Sources
Ministerial Coordinator		\$1,500	

Budget Item	Panel Request	Iloff Request to St. Lawrence	Other Sources
Project Administrator	\$4,000		
Presenter Stipends 3-4 events annually	\$1,500		
Travel for presenters	\$ 500		
History Faculty stipend		\$1,800	\$ 1,700
Polity Faculty stipend		\$1,800	\$ 1,700
Another UU credit course		\$1,200	\$ 1,200
Grant management fee	\$ 100		
Occasional rental at Iloff	\$ 500		
Inkind from congregations			\$ 2,000
Inkind from MDD			\$ 3,000
Fees from non-students			500
Funding Source Totals	\$6,600	\$6,300	\$10,100
Project Total			

**Members of the Front Range Unitarian Universalist Ministers' Association
committed to implementation of this proposal**

Rev. Nancy Bowen
District Executive, Mountain Desert District
Yale Divinity School
executive@mdduua.org

Rev. Rudi Gelsey
Parish Minister (retired)
Meadville Lombard Theological School
rudigelsey@earthlink.net

Rev. Jann Halloran
Minister, Prairie Unitarian Universalist Church
Iloff School of Theology
jannhalloran@aol.com

Rev. Tom Korson
Community Minister (retired)
Iloff School of Theology
tkindenver@comcast.net

Rev. Kirk Loadman-Copeland
Senior Minister, First Universalist Church
Meadville Lombard Theological School
Kirk@firstuniversalist.org

Rev. Barbara Malfese
Community Minister
Iloff School of Theology
barbara@bvwhc.org

Rev. Peter Morales
Senior Minister, Jefferson Unitarian Church
Starr King School for the Ministry
petermorales@jeffersonunitarian.org

Rev. Mike Moran
Minister, First Unitarian Society of Denver
Starr King School for the Ministry
darev@firstunitariandenver.org

Rev. Nadine Swahnberg
Community Minister
Garrett Evangelical Theological Seminary, MDiv
University of Chicago, PhD
nadineswahnberg@jeffersonunitarian.org

Rev. Nathan Woodliff-Stanley
Minister of Social Responsibility,
Jefferson Unitarian Church
Yale Divinity School
nathanws@jeffersonunitarian.org

Tracey Wilkinson
Minister of Pastoral Care,
Jefferson Unitarian Church
Union Theological Seminary
traceywilkinson@jeffersonunitarian.org

