

Report to the UUA Panel on Theological Education re: 2007/8 Research Project.  
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### ***Part I – HDS Students and Affiliates***

We interviewed eight current students, mostly in their 3<sup>rd</sup> year, two recent graduates, two of our denominational counselors or denominational polity teachers and one denominational executive. We asked them to describe the strength and weaknesses, as they saw them, of the Harvard Divinity School's program and resources to prepare students for Unitarian Universalist ministry. Each interviewee either addressed on his/her own or was asked to assess HDS in 5 specific areas: 1) Course offerings, 2) Denominationally specific advising, 3) The UU student group (HUUMS) 4) Field Education or internship experiences, and 5) Preparation for meeting the MFC. There is, of course, considerable overlap among these categories.

### **Course Offerings**

Interviewees tended to divide course offerings into three general areas specifically related to ministry preparation: 1) UU Polity and Religious Education courses, 2) UU History and theology courses and 3) Courses in the arts or practices of ministry. Some interviewees reflected on the general academic environment of the school and others on the diversity of the student body.

It is worth noting that the two recently graduated and ordained interviewees were generally more satisfied and less anxious about their preparation for ministry. While the sample size is not statistically relevant, one likely explanation, which will be reflected in current students' comments, is that anxiety is high for most students over their denominational approval for ministry.

### ***UU Polity and Religious Education***

At the end of last year the UU Denominational Counselors and Denominational Polity Instructor of several decades, Ed Lynn, retired. We have split the position and have hired John Buehrens as instructor in polity and Terasa Cooley as denominational counselor. All comments about the polity course reflect the situation prior to this year. All parties were agreed that the current group of instructors and counselors are up-to-date in their knowledge of the UUA. Both graduated interviewees found their polity and RE courses excellent. The assessments of current students were more mixed. Two found the courses to be "fluff" or "pro-forma." Four found them useful or excellent. Two found them not very useful. Given the small sample size and the transitions in personnel, the most we can conclude here is that the student assessment of the previous configuration was mixed, and there is significant optimism that the new configuration will be an improvement.

### ***UU History and Theology Courses***

All interviewees noted that it is currently necessary to cross-register into classes at other schools for UU theology classes. However, the assessment of that fact was mixed. Both graduated students noted the value of taking classes at other campuses in the BTI. Among current students about half were satisfied with the current situation. The other

half was not, and one student felt the UU History and Theology course in the BTI was not challenging. About half the students took courses from the current offerings at HDS in American religious history. Surprisingly, about half did not. Of those who did there was high satisfaction. Of those who did not the reasons given were more interest in recent history or a desire for a more specifically UU focus. Almost all interviewees looked forward to HDS's filling the Emerson Chair and opined that it would enrich UU offerings at HDS.

#### *Courses in the Arts and Practices of Ministry*

All students and graduates rated their experience of HDS courses in the arts and practices of ministry highly. One graduate indicated the course he took in leadership was the single most important course in his first settlement. The new denominational counselor and the new polity teacher, who are both HDS graduates, noted a significant improvement from their student days in collegiality, emphasis on ministry, resources for ministry training and quality of courses in the arts and practices of ministry. The denominational executive felt that HDS provides a very strong academic preparation in a religiously diverse environment, but he did not speak about whether it had such strengths in the arts and practices of ministry.

#### **Denominationally Specific Advising**

Student responses to this question tended to address advising both within HDS and within the UUA.

Regarding HDS resources for denominational advising, of the two graduates one felt that the denominational counselors were not especially helpful, while the other found them generally useful. Current students were evenly divided concerning the adequacy of denominational counseling; although, most of those who had negative perceptions felt the new appointments either were making or would make a difference. The negative comments revolved around two areas: 1) not enough support and guidance through the process and difficulty in getting appointments with the counselors.

The students who were critical of the HDS denominational counseling resources tended to also to be critical of support from the UUA. One student said that the UUA was not responsive or a community of care and lived by the letter of the law, while one of the recent graduates noted that a great benefit of going to school at HDS was the proximity of the UUA offices. One student mentioned that the regional sub-committee process was a welcome improvement.

#### **UU Student Group – Harvard Unitarian Universalist Ministry Students (HUUMS)**

Among the students, graduates and UU advisors and instructors, there was universal agreement about the vitality and the benefits of HUUMS. One student indicated that she chose Harvard after experiencing HUUMS worship. Every student put HUUMS at the top of the list of important factors in preparing for ministry and for the MFC. It was universally seen as a peer community of support and guidance, the source of life-long collegial relationships, and a group within which to learn and try the arts of ministry. Second and third year HUUMS students mentor newer students. HUUMS organizes

study groups for MFC preparation. Interestingly, a few students saw HUUMS' strengths as a sign of weakness in HDS and the UUA, the logic being that HUUMS was providing what the school or movement ought to be. The polity teacher noted that while HUUMS is generally excellent, it tends to foster an environment of anxiety.

### **Field Education/Internships**

All students ranked their field education experiences highly. They noted a significant degree of integration with their studies. These observations match the exit responses of HDS MDiv students across the denominations. None of the interviewees had completed a full-time internship; although full-time UU internships do fulfill HDS field education requirements. The two graduated interviewees and those students closest to their graduation dates had a more clearly articulated appreciation for their field education placements. One student observed that field education helped teach her what she didn't know she didn't know. The polity teacher felt there should be better communication between the HDS field education program and the UUA internship program, and the denominational counselor, polity teacher and denominational executive all expressed a preference for the full-time internship over the two-year part-time fulfillment of the requirement.

### **Preparation for Meeting the MFC**

With the exception of one second year and one third year student, all graduate and student interviewees felt as they had been or would be well-prepared for their meeting with the MFC. The two students who felt anxiety about the process were among those interviewees who also reported feeling the least support from either the school or the denomination generally.

### ***Part II – Analysis of Ministry Statistics in UU Churches***

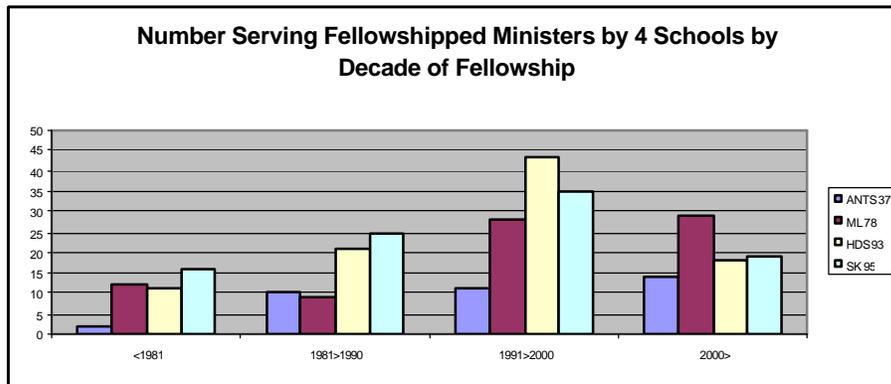
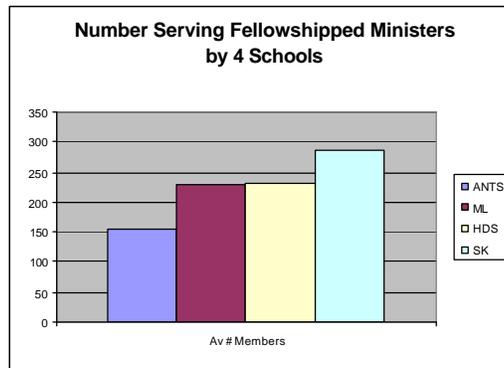
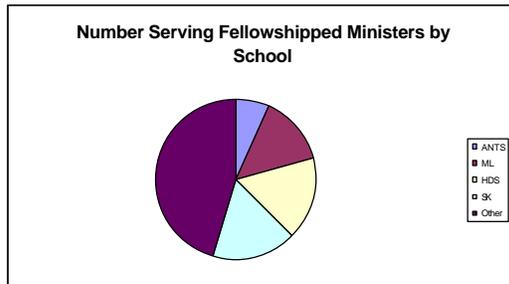
This portion of the research project proved to be the most challenging in that all data was available to us only in paper form by way of the 2008 UU Directory. We hand-entered data into spread sheets in order to perform statistical analysis. We sought to correlate the number of congregations served by ministers educated at four selected schools, the average size of those congregations, and the duration of tenure in the current congregations. We concentrated our analysis on congregations with active ministers who had graduated with some form of theological degree. We analyzed senior or sole pastors. We did not include associate pastors, religious educators, or emeritus staff, nor did we include congregations being served by consulting or interim ministers.

553 congregations (of a total of 1041 congregations) met the criteria of having an active senior or sole pastor who was theologically educated. Of those 553 congregations 303 (54.8%) were served by ministers from 4 schools: 37 from Andover Newton, 78 from Meadville Lombard, 93 from Harvard Divinity School, and 95 from Starr King School of Theology. The school with the next most serving graduates in our criteria congregations was Pacific School of Religion with 13. The chart below shows the total number of ministers who were currently serving (2008 Directory) in our criteria congregations by school and by year fellowshiped, with the four top feeder schools broken out.

All data are snapshots as of the 2008 Directory.

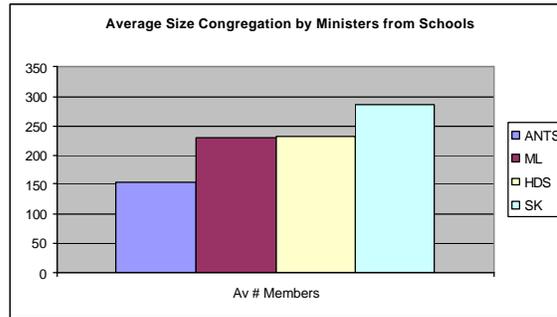
**Number of fellowshiped sole or senior pastors at serving in criteria congregations by decade fellowshiped and seminary of MDiv or first theological degree.**

	<1981	1981>1990	1991>2000	2000>	
ANTS	37	2	10	11	14
ML	78	12	9	28	29
HDS	93	11	21	43	18
SK	95	16	25	35	19
Other	250				



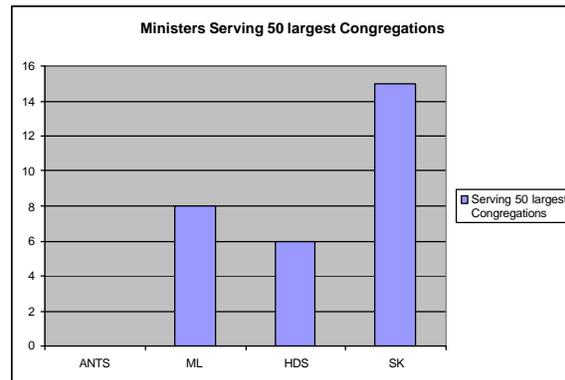
The average size of congregations served by ministers from these four schools is:

	Av # Members
ANTS	156
ML	230
HDS	232
SK	286



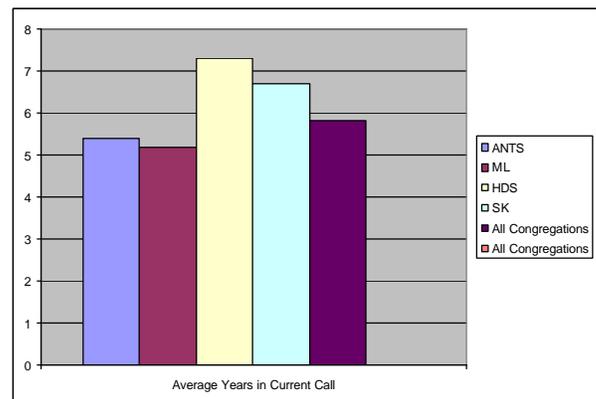
Of the fifty largest congregations 29 are served by ministers from the four schools:

	Serving 50 largest Congregations
ANTS	0
ML	8
HDS	6
SK	15



The average ministerial tenure in all criteria schools and in the four schools is:

	Average Years in Current Call
ANTS	5.4
ML	5.2
HDS	7.3
SK	6.7
All Congregations	5.8



### ***Part III – Excellent Minister Interviews***

David Pettee surveyed several long-time Unitarian Universalist officials and asked them to give us a list of the ministers within the movement whom they would characterize as excellent. We compiled those lists, and selected for interviewing those ministers who appeared on more than two lists. Our short-list comprised eleven ministers, nine of whom we were successful in interviewing. Of the nine, one graduated from seminary in the 1960s, four in the 1970s, three in the 1980s, and one in the 1990s. Ministry was a second career for one who graduated in the 1990s. All interviewees were seasoned ministers and middle or late middle-aged. Seven were men; two were women. Seven were parish ministers; two were community ministers. Seven did their seminary training at Starr King, one at Harvard, and one at Vanderbilt.

We asked each interviewee to describe the things that they believed made them the ministers they are. We wanted to listen to the personal and professional autobiographies of ministers who were generally acknowledged to be excellent. A sub-text for this portion of the research project was to develop at least a sampling of data from these narratives to see what light they might shine on the variety of ways ministers achieve excellence. We hoped that this information might help test some of the assumptions that are often behind proposals to improve or promote excellence. We were especially interested, of course, to test assumptions about the roles of theological education or ministerial formation at seminary and of continuing education. However, our working hypothesis was that there might well be other factors, so we initially asked the question very generally and only later in the interview asked interviewees to highlight their seminary or continuing education, if they hadn't already. Every interviewee mentioned the importance of seminary training, but the reasons given varied widely. In most cases, but not always, continuing education came up on its own. However, we also heard of several other factors that influenced ministerial formation and excellence. The responses fall into five broad categories: 1) Seminary, 2) Field education and internships, 3) Mentoring and colleagues, 4) Continuing education, and 5) Leadership ability.

#### **Seminary**

The two interviewees who went to Vanderbilt and Harvard both mentioned the importance of their intellectual formation. They both spoke of the importance for them of the juxtaposition and integration of the intellectual and the “practical” aspects of formation.

The seven interviewees who went to Starr King gave a more varied account of their seminary experiences, in part due to the greater number of them. One highlighted the integration of academics and practice and noted that a primary role of ministers is that of educator. Another chose Starr King because he already “had a solid academic background,” but he also noted that seminary is the place “to wrap one’s head around religion,” and that the denominations should not expect seminaries to teach organizational leadership, for example, but the denominations should be prepared to offer such instruction themselves. Six of the seven ministers who attended Starr King mentioned and valued personal development aspects of their seminary experience. “A time of discernment,” said one. “Met him where he was,” said another. “Starr King

allowed him to imagine what was important for him to do and then to figure out how to get credit for it,” said yet another. And another said, “The seminary accepted and celebrated what she brought, the school was a co-learner with her, and it helped her get out of her own way.” One noted a culture of, “Thou mayest ....” One described the greatest benefit of his seminary experience as the feedback he received. Another went so far as to say Starr King saved her life.

### **Field Education/Internships**

Either because of the era when they attended seminary or because, as in at least one case, they were not fellowshiped until well after seminary, the formal requirements for field education and internships that our interviewees experienced were various. Nonetheless, all interviewees had some form of practice-based learning experience. One found field education a bad experience, and another did not find it especially valuable. The other seven valued their internship and/or field education experiences highly. One said it led her to further academic work. Mentoring and accountability were frequently mentioned as a valuable part of these experiences. One interviewee noted a strong preference for full-time internships, and another, while not stating a preference of full-time over part-time stated that it was critical that internships take place within the course of a student’s theological education.

### **Mentors**

All interviewees ranked mentors and collegial relationships as critical to becoming and being the ministers they are. It’s fair to say that the interviewees agreed about this category more than any other; although each had his or her own story. One noted that the studies show that the ministers are the most vulnerable to failure in the first three years of their ministry, which suggests the importance of developing collegial or mentoring relationships early on. Several mentioned that they still rely on trusted collegial relationships begun in seminary or early in their ministries. Several mentioned that they have now become mentors for younger ministers. Throughout the interviews three themes were repeated. First, mentors and colleagues drew the interviewees out from the isolation that often accompanies ministry. Here, building trusting and trusted relationships and social networks was the critical feature. Second, trusted mentors and colleagues were listeners and agents of accountability. Several mentioned how important it was to have trusted colleagues who were willing to challenge them rather than simply affirm their every idea or move. Here the critical factor seemed to be personal and professional development as opposed to solipsistic indulgence. Third, mentors and colleagues provided concrete advice and information about ministry or areas of mutual interest.

### **Continuing Education**

Continuing education was highly valued by all interviewees, and there were several specific areas of agreement. Nonetheless, there were several areas of significant disagreement as well. All interviewees agreed that excellent ministers seek out continuing education; although one said he learned from collegial conversations more than he did from formal educational events. And many saw continuing education in much the same light as collegial relationships, as opportunities to learn and even be

corrected. One said that he takes advantage of at least two CE opportunities a year, and while we didn't ask the question that way, it is fair to conclude from the interviews that several others would say the same thing. One noted how important it was to stay open in the mind-set of a learner.

The areas of most varied opinion revolved around who should provide continuing education and whether it should be required. Several interviewees stated that they sought out continuing education wherever they could find it, because that way they could fit it to their needs. Several mentioned the Alban Institute and others mentioned seeking CE well outside ecclesial circles. Three interviewees were critical of denominational CE offerings, but two of these thought the denomination should leave CE to others anyway and use its money for other things.

Two of the interviewees held paid roles within the UUA. Both of them felt strongly that CE ought to be required of UU ministers. The interviewee who obtained his CE through the informal channels of collegial relationships was the most adamant that CE ought not to be required. Others voiced significant reservations about requiring CE. However, the reservations were not about the importance of CE. Two interviewees said they just don't like requirements. But all those who agreed that formal CE was important but who objected to it being required said that required CE units would be inefficacious in building excellence in ministers who were uninterested in participating.

### **Leadership Ability**

We have used the term leadership ability as shorthand to capture the content of a provocative question we asked at the conclusion of each interview. We quoted a remark in a conversation with Barbara Wheeler that suggested that about 20% of the people training for ministry are naturally able to put the disparate parts of the work of ministry together. They seem to have the pastoral agility to move in and about the various situations of pastoral work, to bring the many parts of themselves and their learning to bear on their ministry, and to gracefully manage the multiple and changing streams of power, authority and leadership. This 20% will become excellent ministers, according to the assertion, almost irrespective of their theological training. We asked each interviewee to reflect on the assertion. We asked them to tell us whether they thought it was accurate, and if they did what they saw as the implications for credentialing ministers, for ministerial education and formation, and for recruitment of potential ministry candidates.

All interviewees agreed that there was something, as difficult-to-define as it is, that excellent ministers have. Some characterized it as intuition gained through coping in their family of origin. Others were less certain about the source, but concurred that the ability existed. Two interviewees described it as the capacity to function politically. Others described it as a complex of qualities that included openness to criticism, openness to making mistakes, self-awareness, awareness of context, comfort in one's own skin, knowing how to respond to situations, and willingness to admit not knowing everything. One interviewee thought this elusive capacity was generally a learned quality. Remarkably, eight of the nine interviewees thought it was in some sense innate. Of them, almost all thought it was either very difficult or impossible to learn it. One said,

“Leadership is hard to teach.” Another said, “One in five has it in his bones.” Another said, “Some are clueless, and they stay clueless. Others just know how to respond.”

#### ***Part IV Executive Summary and Recommendations***

As our proposal for this research project indicated, we thought the research might give us some interesting data that would point to further areas of investigation, but that it might also, in a few areas, suggest concrete actions. It seems clear that those expectations were about right. In this final section we will summarize some of the implications in both categories.

#### **Related to Part I, HDS Students and Affiliates**

##### *1. Course offerings*

- a. *UU Polity and religious education.* As we noted above, the transition in personnel makes this area somewhat difficult to assess. However, two noteworthy conclusions seem warranted. It seems that the most anxiety expressed by students about courses, as well as other areas was expressed by students still in the denominational process. While that is not surprising, we will have some suggestions under ‘denominationally specific advising’ of ways to help ameliorate the anxiety. Second, because there was a nearly universal impression that Ed Lynn had become out-of-date as a denominational counselor well prior to his retirement, this spring we are rolling out a more robust annual evaluation process for polity teachers and denominational counselors.
  - b. *UU History and Theology.* This is another area of transition. With the anticipated filling of the Emerson Chair, we hope to have more history and theology resources relevant to UUs available soon. However, a number of students noted that the need to take courses on other campuses of the BTI has definite benefits. We concur with that assessment. In any case, this category is changing, and we will no doubt revisit more than once over the next several years.
  - c. *Courses in the Arts of Ministry.* The very interesting conclusion, from our standpoint, was that our students and recent graduates rate this area very highly. Our polity teacher and denominational counselor who attended HDS both noted a dramatic change in this area from their era. However, denominational officials not in close contact with the day-to-day workings of the school see Harvard as a good place for intellectual preparation for ministry but not so good a place for preparation in the arts of ministry. It seems clear that whatever light we have, which by several accounts is considerable, is currently under a basket.
2. *Denominationally Specific Advising.* Student responses in this category most revealed their anxiety regarding denominational approval for ministry. Their perceptions of the availability of counselors and the rigidity and lack of care of denominational officials are at considerable odds with what the counselors and officials themselves report. We propose a conversation among the Office of Ministry Studies at HDS, David Pettee and others at the UUA, our UU polity

- teachers and denominational counselors and the leadership of HUUMS to discuss ways to improve communication and reduce student anxiety and criticism to an appropriate level.
3. *UU Student Group*. By all accounts, HUUMS is a significant resource, practice ground and place where significant professional relationships are formed. It would appear that the remaining task is to help some students out of their culture of complaint. It is a particular kind of professional immaturity that turns one's strengths into a sign that others aren't doing enough for you. We see this as an area ripe for ministerial formation.
  4. *Field Education and Internships*. To restate the conclusions from above, the field education and internship experiences are very highly ranked among students and graduates. Since field education and internships scored much less well with the excellent UU ministers we interviewed (Part III), further investigation is warranted. It is clear field education and internships were far less integrated into theological education in the years that most of them attended seminary, so one might hypothesize a different reporting among younger excellent ministers. In any case, the efficacy of field education and internships remains an area for further research. The suggestion for more communication between the HDS field education personnel and the UU internship personnel seems an obvious and simple action item, which we will pursue.
  5. *Preparation for the MFC*. Ironically, with the exception of one second year student and two third year students, our student interviewees reported feeling well-prepared to meet the MFC. Our suggestions in this area are covered under "Denominationally Specific Advising" above.

### **Related to Part II, Analysis of Ministry Statistics in UU Churches**

The results of this section of the investigation revealed several interesting facts, and also points to further research. Among the notable observations:

- 54.8% of the senior or sole pastors in UU churches served by theologically trained and fellowshipped senior or sole pastors graduated from four schools: Andover Newton, Harvard, Meadville Lombard and Starr King.
- Andover Newton is a relative newcomer in preparing significant numbers of UU ministers, but in this decade is in a strong fourth place in numbers.
- Harvard saw a 100% increase in the 1990s compared to the 1980s, but has dropped back roughly to its 1980s numbers.
- Of the 50 largest UU congregations, 29 are served by ministers from these four schools, and Starr King graduates serve over half of those, 15.
- HDS graduates (7.3 years) stay in call about six months longer than Starr King graduates (6.7). HDS graduates stay in call about two years longer than Andover Newton (5.4 years) and Meadville Lombard (5.2 years) graduates.

Clearly, the most obvious conclusion is that these four schools are all important theological institutions for forming UU ministers. As we will see in the next section, there is some reason to believe that the schools may each attract different kinds of students. The current level of analysis, however, cannot reveal in any statistically meaningful way what, if any, the differences are or what relevance they may have for

ministerial excellence. Thus, an area for further research is both a broader and more granular analysis of the Directory data and other statistical data the UUA may have.

### **Related to Part III, Excellent Minister Interviews**

These interviews, designed to let us hear in their own words from ministers who were generally identified to be excellent what made them the ministers they were. Eleven ministers were identified (identification process above), and nine were interviewed. Of the nine interviewed, seven graduated from Starr King. That is an overwhelming number, and it comports with the fact that Starr King graduates had as many graduates as ministers of the fifty largest UU congregations as the other three schools we focused on combined. Nonetheless, the sample size is not statistically relevant, so must be cautious in interpreting and correlating the information between these two sections.

We identified five broad areas that influenced all of our interviewees: 1) Seminary, 2) Field Education or internship, 3) Mentors, 4) Continuing education and 5) Leadership ability.

1. *Seminary*. All interviewees found their seminary experience to be important; however, the reasons were quite various. While not conclusive, the interviews were suggestive that different people go to seminary with different goals and needs and that those goals and needs seem to influence their choice of seminary. Much research remains to be done here. By its nature, the data we developed about seminary experience in this section was quite old. Wider interviews of ministers and students about their choice of seminary as well as research about the curricula and pedagogies of seminaries would undoubtedly be valuable.
2. *Field Education and internships*. Seven of nine interviewees found their internships and/or field education experiences to be valuable, and these experiences for the most part took place when field education, at least, was far less rationalized and organized. Current student and recent graduate interviews would suggest that these experiences remain valuable. Again, wider research would be possible and informative.
3. *Mentors*. Our interviewees to a one said that mentors and collegial relationships were very important in making them the ministers they have become. While further research could be done to confirm this finding, it would seem to us to be quite firm. It would suggest that finding ways to further encourage and develop collegial relationships would be effort and money well spent. This would seem especially true among ministers who are currently isolated.
4. *Continuing education*. Continuing education seemed to be a hot-button issue. Most interviewees valued it, and most were comfortable seeking it out on their own. There were mixed opinions about whether the denomination should seek to provide more of it, or how well equipped it is to do so. Even more controversy surrounded the question of requiring continuing education. Those who were opposed to requiring it tended to value it themselves, but they were unconvinced that requiring continuing education would motivate those who are disinclined toward it. A hunch we have, apropos of the discussion of collegiality, is that it

might be interesting to try some events that would gather colleagues around a primarily social agenda.

5. *Leadership Ability*. The question of leadership ability and whether it can be learned raised interesting questions for further research. In some real sense this characteristic seemed to stand in for the term 'excellence' for many of the interviewees. Many believed that one either has it or doesn't. At least one interviewee thought it could be developed. To the degree that it is a 'natural' characteristic, it would seem that leadership ability is a characteristic worth defining and identifying and used in recruiting and evaluating ministry candidates. Conversely, to the degree that it can be taught and learned, it would seem important to assure that those who are deficient in this characteristic receive proper formation in it. This whole topic would benefit from additional research.