

MINISTRY AS COLLABORATIVE ENGAGEMENT: ORGANIZATIONAL
LEARNING IN TEACHING CONGREGATIONS

by

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(Under the Direction of Lorilee R. Sandmann, Ph.D.)

ABSTRACT

The rise of inductive clergy education and the formative power of congregations as contexts of learning for clergy have combined in the emergence of teaching congregations as organizations that teach and learn. The purpose of this qualitative study was to ascertain how teaching congregations learn while facilitating the training and development of beginning clergy in the inductive phase of clergy education. Four research questions guided this study: (1) What is the learning for the congregation? (2) How does the congregation learn? (3) What factors facilitate or impede learning? (4) What changes in structure, roles, and organization, if any, occur? A case study was conducted with an exemplary teaching congregation engaged in an ongoing pastoral residency program. Interview data from staff, laity, and residents were analyzed using a constant comparative method. Learning organization theory, applied to a congregational context, served as the investigative tool. Findings indicate development and change in a teaching congregation align with action imperatives of learning organization theory. Analysis yielded five conclusions: (1) Reciprocity of learning provides multiple system benefits making ministry a collaborative engagement; (2) The congregational system

takes on a culture of reflection through engagement in ministry practice; (3) Failures, crises, and conflicts within systems are contextual jolts leading to learning that can stimulate change; (4) The influx of newcomers into the system brings an infusion of ideas, vitality, and role and identity clarification; and (5) Systemic change is facilitated by visionary leaders who combine strategic thinking with personal action. Implications include: (1) Laity training in critical reflection would benefit congregations; (2)

Congregations should consider formalized mentoring when hiring staff entering their first call; (3) Congregations can take action toward ministry as collaborative engagement; (4) Theological institution leadership and the clergy community should take concrete steps toward residency requirements following seminary; and (5) Theological schools should be offered opportunity for elective classification of congregational engagement.

Recommendations include: (1) Further study in teaching congregations to provide strength and clarification for findings; (2) Adapting the Dimensions of Learning Organization Questionnaire for congregations and other nonprofit organizations; (3) Expansion of research in the scholarship of engagement to professional schools.

INDEX WORDS: Teaching Congregation, Learning Organization, Engagement, Pastoral Residency, Reciprocity of Learning, Contextual Jolts

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DEDICATION

To

Charles Wesley Granger and Frankie Elizabeth Huff Granger

My father and mother

For their unwavering encouragement and financial support

You have made possible my education and I thank you

Your life's example and commitment to each other continue to inspire me

and

Teresa Ann Hunt Granger

My spouse and partner in life

For your love, patience, encouragement, and friendship

Your diligence, focus, and pursuit of excellence motivate me

and

Benjamin Ryan Granger and Adam Thomas Granger

Our sons

I am proud of you and I love you

You make me want to do my best

Our family's strength, commitment, and vision

remind me of the motto on Ernest Shackleton's family crest:

By Endurance We Conquer

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TABLE OF CONTENTS

	Page
ACKNOWLEDGEMENTS	v
LIST OF TABLES	x
LIST OF FIGURES	xi
CHAPTER	
1 INTRODUCTION	1
Problem Statement	14
Purpose of Study	15
Significance.....	15
2 LITERATURE REVIEW	17
Preservice Clergy Education.....	17
Inductive Phase of Clergy Education.....	27
Congregations as Contexts.....	30
Organizational Learning	33
Summary	50
3 METHODOLOGY	53
The Design of the Study	53
Sample Selection.....	59
Data Collection	65
Data Analysis	73

	Validity and Reliability.....	81
	Data Reporting.....	85
4	CASE STUDY REPORT.....	88
	The Beginning of the Story.....	88
	Description of Church Context.....	92
	Pathways to Ministry.....	93
	Development of the Program.....	95
	Components of the Program.....	97
	The People of the Data.....	101
	An Engaged Teaching Congregation.....	105
	From Grants to Sustainability.....	108
	A Final Reflection.....	109
5	FINDINGS.....	112
	What Do Congregations Learn?.....	114
	How Do These learnings Occur?.....	141
	What Factors Facilitate or Impede this Learning?.....	155
	What are the Changes that Occur in the Organization?.....	179
	Summary.....	197
6	SUMMARY, CONCLUSIONS, AND IMPLICATIONS.....	199
	Summary of Findings.....	199
	Implications for Theory.....	202
	Conclusions.....	205
	Implications for Practice and Policy.....	218

Future Research	227
Summary	230
REFERENCES	232
APPENDICES	
A TABLES.....	247
B RESEARCHER BIAS AND ASSUMPTIONS	254
C INTERVIEW GUIDES	256
D IRB.....	261

LIST OF TABLES

	Page
Table 1: Pathways to Ministry Components	62
Table 2: Sample Criteria	64
Table 3: Interview Guide Comparison.....	71
Table 4: Table of Findings	112
Table 5: What Do Congregations Learn Findings	115
Table 6: How Do These Learnings Occur Findings	141
Table 7: What Factors Facilitate or Impede this Learning Findings	155
Table 8: What are the Changes that Occur in the Organization Findings	179
Table A1: Criteria Selection for Individual Interviews	247
Table A2: Interview List and Criteria for Selection Sent to Program Administrator	250
Table A3: Proposed Interview Schedule.....	251
Table A4: Document Selection and Criteria.....	252

LIST OF FIGURES

	Page
Figure 1: Sample Table for Data Analysis.....	76
Figure 2: Sample of Sorted and Highlighted Data.....	77

CHAPTER 1

INTRODUCTION

Beginning with the establishment of Harvard in 1636, religious and societal issues have influenced the theological training of ministers for well over 300 years in North America (Hudson, 1981; Naylor, 1973, 1977; Sweet, 1937). Reports emerged in the late 20th century pointing to signs of clergy shortages (Chang, 2004; Price, M. J., 2002; Wind & Rendle, 2007). The initial response to the studies depicting a clergy shortage was a rally to increase the calling and recruitment of clergy into the profession. As responses continued and further studies were conducted, focus shifted from enrollments and the quantity of projected clergy to the quality of clergy and their training. Curricular designs included new forms of context-based learning and experiences for seminary students. Congregational contexts not only became places of practical learning for students, they emerged as teaching organizations. Knowing that teachers often become learners, the question emerges for investigation, “What are these teaching congregations learning in this role of teaching and developing clergy?”

Curricular Approach for Closing the Theory-Practice Gap

Conflicting views of the curricular approaches of seminaries to address effective training of individuals for congregational ministry have surfaced throughout the decades of theological education (Holifield, 2007). Nearly a century ago, Matthews (1912) addressed tensions facing theological schools focused on graduate-level education. He advocated practical experience as an integral part of the training and education for the

students so they might “lead a church in a changing social order” (Matthews, 1912, p. 168). Thirty years later in appreciation of Matthews’s work, McGiffert (1942) wrote that the questions raised “helped seminaries to sharpen their focus” as they were about the work of supplying “churches with ministers and teachers adequate to the opportunities before the Christian churches” (p. 398) of that day. However, it was not until 1962 that the Association of Theological Schools approved a new set of accreditation standards that required educational field experience (Eagan, 1987). Over 150 years after the founding of seminaries as professional schools, supervised field experience was incorporated into the curriculum as a requirement. Called by various names, such as field education, supervised ministry, or contextual education, these programs are designed to bridge the gap between seminary and the places of clergy practice, the gap between academic and ministerial perspectives (Beisswenger, 1996; Foster, Dahill, Golemon, & Tolentina, 2006).

Broad discussions of theological education in the 1980s and 1990s addressed issues of fragmentation of field education and theological education (Beisswenger, 1996). Poe (1996) examined studies from the late 1980s and early 1990s focused on the perceptions held by churches and ministers regarding the job seminaries were doing in the preparation of people for ministry. These reports were surfacing at the time that seminary enrollments had entered a period of sustained decline. Perceptions were positive concerning the preparation in the biblical/theological foundations for ministry. However, regarding the preparation for the practice of ministry, there was a near universal complaint. Graduates “felt unprepared for the challenges of ministry, while the churches felt that seminaries did not turn out people ready for ministry” (Poe, 1996, p. 23). Social

leaders and church leaders surveyed by Lynn and Wheeler (1999) expressed similar concerns. These church and community leaders viewed seminary graduates as “overly sequestered, out of touch with the real world, naïve about the challenges of organizational leadership and neglectful of community needs” (Lynn & Wheeler, 1999, p. 16).

The 2005 survey conducted by Auburn Center for the Study of Theological Education in cooperation with the Association of Theological Schools includes reports that “interest in congregational ministry increases during seminary” (Wheeler, Miller, & Aleshire, 2007, p. 3) and “more graduates enter congregational ministry than say they plan to before graduation” (p. 3). However, one concern in the finding is that 20% of graduates involved in ministry (outside congregations) and 25% of those serving in congregations indicate they wish to do something different in their next position. McMillan (2003) identified similar trends, stating “there appears to be a declining number of seminary graduates seeking ordination to serve local churches as well as a growing number who drop out of pastoral ministry in the early years of ministry” (p. 7). Whereas theological education institutions make positive contributions to the interest in congregational ministry for students, the ability or desire to continue in congregational ministry does not seem to continue for seminary graduates.

Seminaries in each of the five traditions – Mainline Protestant seminaries, Bible schools and evangelical seminaries, African American seminaries, Catholic seminaries, and Rabbinical seminaries – have negotiated and renegotiated three issues in designing and conducting their theological training: “1) the relationship of seminary education to the modern university, 2) the influence of social context on educational ideals, and 3) the pedagogical reconstruction of theology and tradition” (Foster et al., 2006, p. 249).

Developments and adaptations in the curriculum during the past two decades reflect two issues in the contextual landscape of the clergy supply. First, enrollment declines in seminaries and demographic changes in the clergy supply led to new directions in theological education. Second, the underpreparedness of clergy raised concerns that practical skills were not being adequately addressed in the curriculum, leading to a reemphasis on the practical applications of theology within the classroom and creative and increased efforts in providing opportunities for learning in ministry contexts outside the classroom.

Poe (1996) claims that a variety of alternatives for the preparation of ministry emerged in the late 1980s and early 1990s. Some innovations were efforts to serve ministry needs, and some “emerged as a strategy for survival for the institution” (p. 23), but many approaches “came as a means to increase student enrollment” (p. 24). Seminaries created off-campus centers and satellite campuses; they also used technologies available at the time, including video, satellite, and telecommunications. Poe claims this led to more students taking classes though not necessarily more graduates. Poe concludes these innovations did not represent a change in what seminaries do, but represented a different method of delivering what seminaries already did. The significant changes have been in the design of courses related to learning the practice of ministry and the increased use of ministry contexts outside the classroom.

Dreibelbis and Gortner (2005) report on their research that dealt with “clergy competency development and congregational vitality . . . focusing on the strengths and weaknesses of theological education for congregational ministry” (p. 25). The study provided insightful findings and reported on the adopted curricular changes at Seabury-

Western Theological Seminary. The authors took their feedback from clergy as “an invitation to consider areas for improvement: to make clearer links between pedagogy, formation, and applicable competency development, with explicit and planful engagement of contexts for ministry” (p. 34). They concluded congregations can be and are environments that can teach students, and have integrated the findings into the curriculum at Seabury-Western Theological Seminary.

Peluso-Verdend and Seymour (2005) studied the “seminary’s ministry degree program curricula, especially regarding the development of spiritual leaders” at the Garrett-Evangelical Theological Seminary. The church relations council, composed of 15 pastors from congregations in four Methodist denominations, engaged clergy and lay people in discussions with faculty at the seminary. Seminary administrators and church leaders shared substantial agreement that “in order to teach faithfully and prepare leaders, the seminary needs to learn from and seek to engage in partner ministries with transforming, missional congregations” (p. 56). They concluded from this 2-year experience that in the training and preparing of seminarians for vital ministries, “partnership, trust, and collegiality among the seminary, its closest judicatories, its faculty, and local congregations” (p. 59) are necessary.

R. A. Nelson (2005) reports on strategies that Luther Seminary developed to address the inclusion of congregational contexts in the curriculum of theological education for its students. Nelson described how Luther Seminary “has been engaged in the curricular work related to the role that involvement in contexts outside of the classroom can have in the education of students preparing for positions of leadership in the church” (p. 75). A Lilly Endowment grant funded the project called “Learning

Congregational Leadership in Context” (Nelson, 2005, p. 75). The six identified goals in the grant reflected as their primary component “developing a capacity for learning congregational leadership in context within alternative congregational learning environments” (p. 77). This was considered a model of “pre-internship contextual education” (p. 82), and was incorporated into the degree requirements for the Master of Divinity.

Three specific field education programs examined in another study sponsored by the Carnegie Foundation for the Advancement of Teaching emphasized “strong linkages between the academic and ministry experiences of students” (Foster et al., 2006, p. 299). These programs vary greatly, and are examples of the ways seminaries approach their requirement for field education in their curriculums. The Yale Divinity School requirement can be fulfilled in two semesters. At Trinity Lutheran Seminary the requirement is integrated, involving 2 years of part-time field placement, at least one unit of clinical pastoral education, and 1 year of full-time internship – coming in the third year – which is in accordance with Lutheran ordination standards. St. John’s Seminary also includes a full-time internship in the third year, along with off-campus ministry experience combined with coursework in the first and second years, an intensive 3-week hospital ministry experience in the first year, and a number of required courses in pastoral ministries. Each program is designed in accordance with the overall mission of the school, a commonality of all schools in the study, and reflects a range of pedagogical practices, including pedagogies of the reflective practitioner, pedagogies blending tradition and student vocation with pastoral responses to congregational needs, and

pedagogical approaches seeking to develop pastoral habits and the mind of the priesthood.

The Candler School of Theology research program in the early 1990s into congregational studies gave focus to “the relationship between ecclesial practices, congregations, and the education of Christian ministers” (Frank, 1997, p. 93). Comments from student research assistants involved in the project reflected the importance of the residency and study programs being developed to bridge the transition from seminary to becoming a pastor. As one of the students replied, “‘It’s almost criminal’ not to give seminarians a chance to ‘see the underbelly’ of a congregation” (Frank, 1997, p. 100). Daniel Aleshire, executive director of the Association of Theological Schools, encourages seminaries to continue to make room for the disciplines of practice in their curriculum (Aleshire, 2005). A particular emphasis van der Water (2005) brings to the discussion of theological education is the “primary role of the local church, parish, or congregation in the processes of formation for ministry and mission” (p. 210).

Fragmentation was described as being between heart and mind, between academic study and activities found central to the work of ministry, between being, knowing, and doing, and between theory and practice. Furthermore, fragmentation was “between the ethos of the academy and the ethos within a church or community” (Beisswenger, 1996, p. 56). Curricular developments may have a positive impact on enrollment, and serve to strengthen the practical ministry skills of students for entry into congregational and ministry settings; however, the gap between theory and practice within the academic program calls for additional training and development of early-career clergy. Ultimately, however, “the pedagogical activity . . . begins in practice” (Foster et al., 2006, p. 323).

Congregations Serving in the Role of Teaching and Developing Clergy

Despite curricular reforms, new developments in field education, and additional out-of-classroom learning opportunities to integrate the learning and preparation of students (Dreibelbis & Gortner, 2005; Foster et al., 2006; Johnson & Johnson, 2000; Jones & Jennings, 2000; Nelson, R. A., 2005; Peluso-Verdend & Seymour, 2005), there remains dissatisfaction with readiness for ministry among students and faculties, and in the congregations and contexts that receive these new leaders (Hess, 2008). A key complaint from both students and congregations is that seminaries do not adequately prepare students for the actual contexts of ministry that they enter following graduation. According to Hess, what we know about clergy training in this preservice phase is that it continues to produce “dissatisfaction within formal theological education for the practice of ministry, and dissatisfaction beyond into its constituencies” (p. 14), resulting in questions of competence, excellence, and standards difficult to resolve. “Schools are an efficient and effective strategy for the complex and sophisticated learning that good ministry requires, but other, equally complex and important learning depends on other settings and contexts” (Aleshire, 2008, p. 58).

Burns and Cervero (2002) studied how pastors learned the politics of ministry practice. Among the implications in this study, they conclude, “model churches could have an important role in the training of pastors” (p. 317). One of the ways churches could fulfill a training model would be to “develop programs to expose candidates and pastors of other churches to their ministries” (p. 318). Such an exposure would not focus on “reproducing substantive programs, but rather [serve] as a reflective workshop on ministry issues” (p. 318). McMillan (2003) points to apprenticeship and mentoring,

teaching and learning models grounded and linked to the context of the congregation, claiming these should be happening before, during, and following seminary, especially in the early years of pastoral ministry. The first 5 years for early-career clergy are a critical period for mentoring and support (Carroll, 2006; McMillan, 2003).

Various changes in the landscape of the supply, development, and support of clergy have generated programs targeting specific aspects of the clergy issue. The induction phase of ministry, the transition from the academy to the contextual setting, has surfaced as a unique phase for clergy education. Other professions such as medicine and engineering do not leave this transition to chance, but require significant periods of apprenticeship into the actual practice (Wood, 2006). A unique characteristic of theological schools is they educate persons who go directly into leadership roles following graduation, a distinction from the professional school counterparts in the fields of medicine and law (Aleshire, 2008). The Transition into Ministry (TiM) initiative, funded by the Lilly Endowment set out to counter the two-centuries-long approach of viewing pastoral preparation as “something that is largely completed upon graduating seminary” (Wind & Wood, 2008, p. 5). TiM made a bold investment from the outset, “that the actual performance of ministry in local congregations is how and where pastors finally become pastors” (Wood, 2006, p. 9). Reshaping the preparation of Protestant clergy was the core of this initiative, by supplementing conventional seminary training with “a focused apprenticeship in a ‘community of practice’” (Wind & Wood, 2008, p. 5).

The recent report from the Transition into Ministry project of the Lilly Endowment and the Alban Institute addresses this very type of experience for

postgraduate students in residency programs and full-time settings that provide for mentoring and practical learning. These early-career clergy are engaged in learning identified as reflective immersion. Reflective immersion “allows space for observation and critical reflection along with full participation” (Wind & Wood, 2008, p. 27). This report identifies the formative role that congregations play in the development of clergy who are in their beginning years of full-time congregational service. Acknowledging the role of fieldwork in seminary education as effective, the report “situates practice-centered pastoral formation squarely within the time, space, and content of congregational life” (p. 20). The Transition into Ministry initiative began in 1999. The report, a “first report, based largely on the self reporting of the project’s participants” (p. 19), identifies over 20 congregation-based projects and approximately one dozen seminary- or denomination-based projects that offer full-time employment to newly graduated seminarians in a context that provides apprenticeship experiences.

Congregations take center stage in the training and development of early-career clergy. The report claims that these projects “put the congregation at the center of the learning experience and return practicing clergy to a central teaching role, while making reflective practice rather than academic study the pivotal way of learning pastoral ministry” (Wind & Wood, 2008, p. 16). The report argues that congregations are critically important in the teaching and learning of ministry, drawing the conclusion that “only when both domains of pastoral formation – the seminary and the congregation – recognize and resource one another can the full range of formation be accomplished” (Wind & Wood, 2008, p. 20). *Pathways to Ministry*, the pastoral residency program of Wilshire Baptist Church in Dallas, Texas, is one example of the programs cited. The

program uses a rotational system, akin to medical hospital programs, rotating pastoral residents through areas of worship, education, stewardship, missions and evangelism, and pastoral care (Mason, 2007). Mason believes this project focused on beginning clergy is of benefit to the whole community of the congregation as well. He states, “everything the church does may become more self-consciously oriented” (p. 6) toward the end of being a teaching congregation. Additionally, Mason claims that the goal is “for the church as a whole to become a teaching community” (p. 7). A comprehensive approach toward this goal, Mason believes, will lead in two directions. One is “a holistic plan for the call and nurture of clergy” (p. 8), and the second is the “discernment of gifts and mentoring of laypersons in ministry” (p. 8). Mason believes that “exporting this work to other congregations is a logical step in creating a movement toward more and better teaching congregations” (Mason, 2007, p. 10).

Literature is available covering decades of effort for narrowing the gap of theory and practice in the professional training of clergy. Additional literature identifies the value of congregations as contexts for teaching clergy skills for ministry that the seminary cannot provide alone. The emergence of residential programs for clergy who have completed preservice education indicates positive outcomes for early-career clergy. The next movement in this progression is to investigate the impact of these programs upon the congregations providing the training. Hopewell (1987) describes the actual life of congregations as “astonishingly thick and meaning-laden” (p. 3) and “held together by much more than creeds, governing structures, and programs” (p. 5). Hopewell’s definition is applicable here: “A congregation is a group that possesses a special name and recognized members who assemble regularly to celebrate a more universally

practiced worship but who communicate with each other sufficiently to develop intrinsic patterns of conduct, outlook, and story” (pp. 12-13).

Congregations are complex systems that include individual leaders, groups, and teams, with overall organizational goals, visions, and activities. Organizational learning and the model of the learning organization provide an appropriate lens for viewing the dynamics of learning in a complex congregational system. Organizational learning is defined by Watkins and Marsick (1993) “as building organizational capacity for new thinking that is then embedded and shared with others” (p. 15). Peter Senge (1990) defines learning organizations as “organizations where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning how to learn together” (p. 3). Furthermore, organizational learning comprises three key components: “(1) systems-level, continuous learning; (2) that is created in order to create and manage knowledge outcomes; (3) which lead to improvement in the organization’s performance, and ultimately its value, as measured through both financial assets and non-financial intellectual capital” (Marsick & Watkins, 1999, pp. 10-11).

Senge (1990) outlines five disciplines present in organizations that learn. Disciplines are developmental paths “for acquiring certain skills or competencies” (Senge, 1990, p. 10) at which individuals can become proficient through practice. These disciplines are personal mastery, mental models, shared vision, team learning, and systems thinking. Organizational learning occurs in organizations where mental models can and do change, where individuals are proactive, curious, and encouraged to be

creative. Characteristically, learning organizations are organizations that have overcome two barriers: tunnel vision – that is, being unable to see the whole system in order to address problems – and truncated learning, which stems from punitive measures for past risks and unrewarded enthusiasm (Marsick & Watkins, 1994). Organizational learning values teamwork and collaboration and works to eliminate a culture of fear.

Application of organizational learning in the context of congregations is a recent endeavor. Hawkins (1997) explores the concepts of organizational learning and the learning organization as useful for congregations seeking to be vital and effective in a world context that is rapidly and continuously changing. Fleischer (2006) applies Senge's theory in her case study of St. Gabriel the Archangel Parish. Her purpose in this qualitative study was to explore how members view learning systems and "to uncover the systemic dynamics of learning in one ministerially active congregation" (p. 110). Fleischer concluded that involvement in ministry by individuals provided for a major pathway for their own learning, "both for personal faith development and for moving toward a shared ministerial vision" (p. 120). Her study indicates that individual involvement in the activity of the church's life and ministry leads to personal learning, a foundational element in the theory of organizational learning (Senge, 1990; Watkins & Marsick, 1993). Furthermore, the study indicated that this personal learning led to a shared vision, another key factor in the theory of organizational learning. As this is evident for individuals engaged in ministry activity in a congregation, the principles should hold likewise for individuals engaged in the teaching and development of beginning clergy.

Problem Statement

Projected shortages and declines in the clergy workforce emerged during the early 1990s, initiating studies to address the readiness of seminary students for ministry, recruitment efforts to increase enrollments (with a focus on younger students), and revised efforts toward contextual-based learning opportunities. Studies led to curricular reforms, new developments in field education, and additional out-of-classroom learning opportunities to integrate the learning and preparation of students (Dreibelbis & Gortner, 2005; Foster et al., 2006). Despite these effective developments there remains dissatisfaction with readiness for ministry among students and faculties, and in the congregations and contexts that receive these new leaders (Hess, 2008). A declining number of seminary graduates seek ordination for service in congregations, and the number of those dropping out of pastoral ministry during the early years is increasing.

Recently the role of the congregation has been identified as a formative power in the professional development of beginning clergy entering full-time congregational ministry (Wind & Wood, 2008). These congregations engaged in the training and development of beginning clergy who have graduated from seminary are described as teaching congregations. Interestingly, congregations involved in this inductive phase of clergy education are discovering that clergy are not the only ones learning. They are participating in a process that involves reflection upon all aspects of the congregation's life and practice. The beginning clergy, staff, and congregation members come to understand "their work and life as one of continuous teaching and learning. In essence, as the congregations work with their new pastors, a new, local ecclesial imagination develops about what the church is and what ministry can be" (Wind & Wood, 2008, p.

36). What is not known is how these congregations learn, and the facilitating and limiting factors in this teaching and learning relationship. A fitting lens for pursuing this question concerning congregations as organizational systems is learning organization theory.

Purpose of the Study

The purpose of this study is to ascertain how teaching congregations learn in the process of facilitating the training and development of beginning clergy in the inductive phase of clergy education. Research questions guiding this study include:

What is the learning that the congregation does in the process?

How does the congregation learn?

What factors facilitate or impede the learning of the congregation?

What changes in structure, roles, and organization, if any, occur?

Significance

This study of the learning of congregations functioning as teaching organizations with clergy provides theoretical and practical contributions. Organizational learning is well documented in the areas of business organizations. Applying this model to congregations increases its use with nonprofit organizations. Congregations, whether involved in clergy training or not, will gain in understanding of their organizational system through the application of this theoretical framework.

Practically, this study not only provides insight and understanding of this teaching relationship for the congregations who are engaged in this process, but will offer incentives and guidance for congregations who are considering becoming teaching congregations engaged in clergy training. Staff in these congregations can gain

knowledge of effective elements for serving as mentors to these clergy in training. Early evidence from these residency programs indicates their value for clergy. Church leaders and program directors will be recruiting new congregations to engage in this process of clergy education. This study will provide information to help answer the questions congregations will ask reflecting a concern about “What’s in it for me?” The study will provide evidence indicating that the time, money, and people resources required for and devoted to these programs can benefit the congregation.

CHAPTER 2

LITERATURE REVIEW

Programs of inductive clergy education are emerging as congregations become teaching congregations in the development of beginning clergy. The purpose of this study is to ascertain how and what teaching congregations learn in the process of facilitating the training and development of beginning clergy in the inductive phase of clergy education. The research questions guiding this study are as follows: (1) What is the learning that the congregation does in the process? (2) How does the congregation learn? (3) What factors facilitate or impede the learning of the congregation? (4) What changes in structure, roles, and organization, if any, occur? This chapter is a review of the literature relevant to this study. It will review literature pertaining to clergy education, congregational contexts, and organizational learning. Beginning with a review of literature in the area of preservice clergy education, focus continues on education for practice within curriculum of theological institutions. The review then addresses literature concerning the inductive phase of clergy education, focusing on congregations as teaching congregations. Literature on organizational learning is addressed in the following section. Finally, this review situates the study within the context of organizational learning as applied to congregations.

Preservice Clergy Education

The relationship of societal needs, or demand, and supply of clergy, paired with the desire to preserve the traditions of religious groups, has influenced the theological

training of ministers for well over 300 years in North America (Hudson, 1981; Naylor, 1973, 1977; Sweet, 1937) making the diversity of seminary education traditions “unmatched in other forms of professional education” (Foster et al., 2006, p. 235). Since the 1980s theological education has been the subject of intense inquiry (Fishburn & Hamilton, 1984; Fitzmier, 2009; Foster et al., 2006; Gilpin, 1989; Kelsey & Wheeler, 1991; Wheeler, 1993; Wheeler et al., 2007) producing essays, reports, and significant literature on the subject (Veling, 1999), such that more may be known now than ever before (Farley, 1997). Farley’s assessment of the literature provided no single recommendation for the improvement of theological education, though he did identify “the acquisition of ministerial skills should entail more than theological education” and “a coherent theological education must rest in some aspect of theology itself” as two familiar themes. More recent reports, particularly the Carnegie Study (Foster et al., 2006), indicated increased attention for providing effective theological education including renewed emphasis in the preparation for ministry practice. However, theological schools continue to place emphasis on the centrality of academic quality in their programs (Farley, 1997), struggling more with professional education than academic education (Aleshire, 2008).

The Places of Novitiate Clergy Education

Providers of theological training include seminaries, universities, training or Bible schools, on-line educational programs, and some congregation-based approaches.

Additionally, laity ministers, individuals commissioned by their denomination to provide pastoral services in congregations that cannot afford an ordained pastor (Carroll, 2006), may receive specific training through the denomination, but not a formal degree. Barker

and Martin (2004) reported that as result of the changing demographics, particularly in Protestant religion, alternative pathways for theological education emerged and became “vital components in the theological landscape” (p. 7). These various programs provided a wider access for theological education, were reinforcing the “contextual and connectional character of ministry” (Barker & Martin, 2004, p. 8), produced leaders instilling a renewed energy in the churches, and were “creating models for a renewed vision of ministry and what it means to be church” (p. 8). Despite these new models, the yardstick of measurement remained the seminary (G. Miller, 2004).

Foster et al. (2006) identified five traditions of formal clergy education: the professional seminary, the Bible or religious training school, schools of emancipation, the modern diocesan seminary, and the rabbinical seminary. Aleshire (2008), executive director of the Association for Theological Schools (ATS), framed the broad enterprise of theological education that includes degree and non-degree programs for leaders of congregations. These include training institutes for those with little or no college experience, programs based in congregations and sponsored by denominational initiatives “to educate leaders who have been or will be credentialed by alternative procedures” (Aleshire, 2008, p. 21).

The Association of Theological Schools (ATS) is a membership organization of graduate schools in the United States and Canada that provide formal theological training. Some member schools, 65%, are freestanding educational institutions, and the remaining 35% operate as part of a larger university or college-seminary combination. According to the *Fact Book on Theological Education 2006-07*, ATS had 253 member schools of which 230 were accredited, 8 were candidates for accreditation, and 15 were

associate members. Of the member schools, 56% are Protestant, 21% are Roman Catholic, 22% are either interdenominational or nondenominational, having either multiple or no denominational affiliation, and 1% are Orthodox. Jewish and Muslim faith groups are also represented. These schools conduct post-baccalaureate professional and academic degree programs in order to educate persons not only for the practice of ministry but also for teaching and research in the theological disciplines.

Over 250 ATS member theological schools, a subgroup of this broad category of theological education, “employ faculties, maintain and grow libraries, admit students to advanced programs of study, grant graduate professional and research degrees, and have endowments” (Aleshire, 2008, p. 21). Bringing particular strengths, making unique contributions and providing particular benefits for communities of faith, theological schools have three assets, namely, institutional strengths, educational strengths, and are durable with the capacity to adapt and survive over time (Aleshire, 2008). With these assets, theological schools prepare leaders for religious vocation, are ideal settings for teaching, and are places of intellectual work helping “the church remember the past, evaluate the present, envision the future, and live faithfully in relationship to all three” (p. 23).

Recent Challenges in Pre-Service Clergy Education

Reports emerged in the late twentieth century pointing to signs of clergy shortages (Chang, 2004; M. J. Price, 2002; Wind & Rendle, 2007). The initial response to the studies depicting a clergy shortage was a rally to increase the calling and recruitment of clergy into the profession. The seminary perspective saw the need to attract more and more students and build declining enrollments (Poe, 1996). Denominational officials also

shared this concern. However, from a clergy perspective, according to Chang (2003), the problem was viewed as the very opposite – a crowded job market. Perspectives varied based on the comparisons employed. Chang (2004) applied the ratio of clergy to the number of churches; M. J. Price (2002) reported on the ratios of clergy to the number of adherents in the churches. Witham (2005) claimed the proportion of ministers to citizens has remained fairly consistent throughout the past century, a ratio of approximately one minister for every thousand citizens, figures consistent with Holifield's (2007) findings on the history of clergy in America.

Another area of focus on the education of clergy was upon the quality of clergy. The Alban Institute report, *The Leadership Situation Facing American Congregations*, reported concern regarding clergy quality as “widespread across denominations and faith traditions” (Wind & Rendle, 2007, p. 8) and connected the lack of quality of clergy to a talent pool that had a deficit of skills, talents, and knowledge necessary for clergy leadership. Carroll (2006) confirmed worries about declining quality, and Wheeler (2001) noted fewer institutions “require that all students in ministry programs be sponsored or approved by ordaining bodies” (p. 17). The lowering of expectations at the time of entrance contributes to a decrease in the quality of students, and a lowering of expectations for entering a clergy career, making the issue cyclical. Carroll observed some clergy in his research whose work seemed average at best and others whose work was less than average. Mainline Protestants, according to Holifield (2007), saw their ministry to be traversing through an uncertain and tumultuous period with declining numbers in the recruitment ranks, seminarians who did not wish to serve in the local

church, and a profession which was now failing “to attract the brightest and best” (p. 267).

Congregational demands impact the seminarians desiring to serve as well as graduates who remain in congregational service as a career. Wind and Rendle (2007) listed factors including the unmanageable nature of the job, blurred boundaries between personal and professional time, unrealistic expectations from demand for various roles to be filled, and standards of evaluation that are confusing, as example of excessive congregational demands. Wheeler (2001), acknowledging that students enter seminary in pursuit of a wide range of goals, claimed less than 60 percent of students planned to be ordained, and ministry within a congregation or parish “is the primary goal of less than one-third of master’s-level students and of only half of the students in master of divinity and other ordination-track programs” (p. 17). Fewer young people are considering a professional clergy career in leading mainline churches (Wind & Rendle, 2007; Wicai, 2001). The 2005 survey conducted by Auburn Center for the Study of Theological Education in cooperation with the Association of Theological Schools indicated a positive change in the demographic trends of seminary enrollments and an increase in interest among students toward congregational ministry (Wheeler et al., 2007). However, male enrollments are shrinking, and women are less likely to enter ministry and to stay. Women also encounter more obstacles than men in religious professions (Wheeler et al., 2007). McMillan (2003) identified a trend toward declining numbers of seminary graduates seeking ordination to serve local churches, and an increase in the “number who drop out of pastoral ministry in the early years of ministry” (p. 7). These trends indicate the possibility of limits within the pre-service phase clergy preparation.

Recent Developments in Pre-Service Clergy Education

Studies on demographic changes in clergy supply, seminary enrollment changes, and perceptions on preparedness for ministry led to an increase in awareness and interest among providers of theological education, as well as denominational leaders responsible to provide congregations with clergy leadership resulting in initiatives within denominations, theological schools and some congregations (Wind & Wood, 2008). During the past two decades, curricular development and adaptations reflect two issues related to the supply of clergy for congregational contexts. First, enrollment declines in seminaries and demographic changes in the clergy supply sparked new directions in theological education. Secondly, underprepared clergy raised concerns that practical skills were not being adequately addressed in the curriculum. A reemphasis of the practical applications of theology within the classroom resulted, as well as increased efforts with providing opportunities for learning in ministry contexts outside the classroom.

During the decades of the 1980s and 1990s theological schools considered varieties of alternatives and innovations in the preparation of clergy and engaged in revisions and reappraisals of the aims and purposes in theological education (Bass & Dykstra, 2008; Poe, 1996). Some innovations aimed at serving ministry needs, others served as a survival strategy for the institution, but many approaches “came as a means to increase student enrollment” (Poe, 1996, p. 24). The significant changes have been in the design of courses related to learning the practice of ministry and the increased use of ministry contexts outside the classroom. Though supervised field experience became a standard and valued component of the educational experience of seminary students

(Egan, 1987), the conversation of adaptation and more integration of practical skills for ministry in the seminary curriculum continues. Daniel Aleshire, Executive Director of the Association of Theological Schools encouraged seminaries to continue to make room for the disciplines of practice in their curriculum (Aleshire, 2005). Claiming the “disciplines of practice radically alter how the theological content is organized” Aleshire (2005) said considerations in the curriculum changes in seminary education should include time for students “to have greater exposure to the environments that facilitate teaching” (p. 5), the needed learning that the classroom does not allow the students to readily attain. A particular emphasis van der Water (2005) brought to the discussion of theological education is the “primary role of the local church, parish, or congregation in the processes of formation for ministry and mission” (p. 210).

In 2005, The Association of Theological Schools published a supplemental issue of the quarterly journal, *Theological Education*, which addressed the incorporation and importance of congregational contexts in the curriculum of theological schools. Dreibelbis and Gortner (2005) concluded in their report on adopted curricular changes at Seabury-Western Theological Seminary that congregations can be and are environments that can teach students, and have integrated this into the curriculum. Peluso-Verdend and Seymour (2005) concluded from their two-year experience through Garrett-Evangelical Theological Seminary that engaged clergy and lay people in discussions with faculty at the seminary, that, “in order to teach faithfully and prepare leaders, the seminary needs to learn from and seek to engage in partner ministries with transforming, missional congregations” (p. 56). Furthermore, the partnership and collegiality between the seminary and local congregations is necessary in the training and preparation of

seminarians. R. A. Nelson (2005), reporting on strategies that Luther Seminary developed to address the inclusion of congregational contexts in the curriculum of theological education for its students, described the value of involvement in contexts outside of the classroom in the preparation of students. This was considered a model of “pre-internship contextual education” (p. 82), and was incorporated into the degree requirements for the Master of Divinity.

Theory and Practice

Theological schools, as is the case with professional schools, are hybrid institutions (Aleshire, 2008; Foster et al., 2006), operating in the academic realm of cognitive rationality and in the world of practice. Historically, learning in theological schools has been intended for two different uses, “either professional ministry or academic mastery” (Aleshire, 2008, p. 46), reflecting the persistent fragmentation of theory and practice, because uses are seen separately, not integrated. Though seminary educators teach in order that students become professionally competent in the roles and responsibilities of professional work of the clergy (Foster et al., 2006), a tension between the theory, or the academic education, and the practical, or skill education remains (Mercer, 2006).

Kelsey and Wheeler (1991) claimed that the persistent use of these contrasting terms “theory/practice” and “academic/practical” in describing the problems in theological education precisely “obfuscates what our problems really are and that makes them so intractable” (p. 18). One positive emphasis these efforts has generated is the focus of formation for ministry, including pastoral formation and the spiritual formation of students, becoming integrated into school curriculums in a variety of ways (Foster et

al., 2006; Hess, 2008; Jones & Jennings, 2000). These integrations are done not at the exclusion of conveying information; however, theological education ought to be about forming people and shaping ministerial identity, in addition to conveying information (Jones & Jennings, 2000). A second positive outcome that is byproduct of addressing the tension in theological education is the importance of incorporating contexts of ministry, such as congregational settings, into the curriculum. Johnson & Johnson (2000) reported that the Candler School of Theology faculty consensus was for theological education to become contextual in all aspects. Other theological schools have engaged in utilizing contextual settings outside of the school (Foster, et al., 2006). A third development in the methods of integrating the practical dimensions of ministry in the academic disciplines of theological education is a renewed approach of practical theology. However, it is a mistake to see *practical* as being the opposite of theory; “practical theology is not practical if we take practice to mean the application of prior systematic understandings” (Veling, 1999, p. 412-413). Practical theology is a critique of the theory-to-practice mindset, and challenges assumptions regarding the need for ordered, rational, and systematic learning. According to Cahalan (2005), it is “an inherently interdisciplinary quest, engaging the full range of theological disciplines” (p. 86).

The persistent gap between the seminary and the congregation, the classroom and the context for practical ministry, theory and practice has received attention for over a hundred years (Beisswenger, 1996; Foster et al. 2006; Hess, 2008; Matthews, 1912; Wood, 2008). Curricular adaptations, writing, and emphasis, though bringing improvements, has neither eliminated nor bridged this gap. Included in the discussion of the gap between seminaries and congregations is consideration that it does not necessarily

need to be bridged in order for clergy to be well educated (Wood, 2008). Long (2008) goes further to say that the gap between seminary and the practice of ministry ought to exist, because “negotiating it well is one of the marks of faithful ministry” (p. 4). Furthermore, good ministry is found “where pastors stand with one foot firmly planted in their theological education and the other foot just as firmly planted in the parish, and allow the resulting tension to shape their pastoral practice” (Long, 2008, p. 5). Much of what is necessary in the learning of pastoral ministry “can only be learned in the practice of pastoral ministry” (Jones & Jones, 2008, p. 17). Wood (2008) concluded, the initial years of ministry serve as an actual stage of preparation and training. Congregational contexts establish “a teaching/learning environment beyond the seminary context in which there is explicit freedom to inquire, question, explore, experiment, acknowledge limitations, fail, and succeed” (Wood, 2008, p. 291).

Inductive Phase of Clergy Education

As noted earlier, various changes in the landscape of the supply, development and support of clergy has generated programs targeting specific aspects of the clergy issue. The aspect of the induction phase of ministry, the transition from the academy to the contextual setting, has surfaced as a unique phase for clergy education. Other professions such as medicine, law, and engineering, do not leave this transition to chance, but require significant periods of apprenticeship into the actual practice (Wood, 2006). A unique characteristic of theological schools is they educate persons who go directly into leadership roles following graduation, a distinction from the professional school counterparts in the fields of medicine and law (Aleshire, 2008). The Transition into Ministry (TiM) initiative, funded by the Lilly Endowment made the commitment to

invest in reshaping the preparation of Protestant clergy through supplementing the pre-service phase of clergy education with a focused apprenticeship in local congregations (Wind & Wood, 2008). The belief that pastors become pastors through the actual performance of ministry in local congregational contexts informed this investment in an inductive phase of clergy training and development (Wood, 2006).

Models of Transition

Reflected in the literature is the notion that the first years, ranging from 3 to 5 years, are critical in pastoral ministry (Carroll, 2006; Dash, Dukes, & Smith, 2005; Fishburn & Hamilton, 1984; McMillan, 2003; Oak, 2006; Schier, 2009b). Congregations whether aware or unaware, are formative for pastoral leaders, positively or negatively (Carroll, 2006; Schier, 2009b). What is unprecedented, however, is the TiM collection of over 30 projects of intervention into the clergy placement system of American Protestantism (Wind & Wood, 2008). Included were 19 residency-based and 15 institution-or peer-based projects representing ten denominational bodies (Wind & Wood, 2008) seeking to “provide a communal ecology necessary for effective ministry” (Schier, 2009b).

Schier’s (2009b) interview with David Wood highlighted these projects into four models. Congregational residencies are characterized by bringing seminary graduates into full-time staff positions in a single congregation for a period of two years that participate in all aspects of pastoral ministry. A second model is called First Call, and is for newly ordained clergy serving in their first placement operating within a single denomination. Demographic based models, a third type, focus on pastors serving in rural areas or small congregations. Lastly, seminary based programs provide coordination of seminary

graduates in new ministry positions along with opportunities to convene regularly in groups.

Reflective Learning Through Contexts, Peer Groups, and Mentorships

Though seminaries receive critique for the “bifurcation of education and formation” (Schier, 2009a), Wood does not believe that these TiM projects should rest on the assumption that seminaries are failing in their work of preparation of clergy (Schier, 2009b). Instead, he claimed that these programs are “rooted in the assumption that there is a kind of learning that seminaries are not well situated to provide” (Schier, 2009b).

The contexts in the TiM projects provide a number of benefits for clergy in their inductive period of professional learning and experience. This process which engages residents in their first vocation is an action-reflection process (Oak, 2006), and provides three benefits which are significant. Immersion in context that is a safe learning environment is one benefit for these clergy (Oak, 2006, Wood, 2006). Situated learning, and reflection in practice are the underpinnings as to why congregational contexts, when garnered with additional outside support, provide such significant formative and developmental opportunities. The second and third benefits derive from the support that accompanies these individuals involved in these projects. All these models provide for new clergy to be involved in a collegial community with their peers in the same process. (Oak, 2006; Schier, 2009a, 2009b). These peer-to-peer learning experiences result in helping students build healthy practices of collegial relationships for the duration of their career. The third benefit is that of learning from mentors, seasoned pastors, who bring knowledge from their pastoral experience into the supportive relationships allowing the new pastors to explore questions related to pastoral identity. (Oak, 2006; Schier, 2009a,

2009b). Finally, the programs of transition into ministry help to cultivate “habits for lifelong learning that are critical to excellence in ministry throughout one’s career” (Carroll, 2006, p. 230).

Congregations as Contexts

Congregations are basic units of American Religious life and primary sites of religious activity. As such, they provide an organizational model, sociability, and community for many; and, “they offer opportunities for political action and voluntarism, they foster religious identities through education and practice, and they engage in a variety of community and social service activities” (Chaves, Konieczny, Beyerlein, & Barman, 1999, p. 458). Congregations are unique social institutions that have a corporate personality created by their history, location, size, beliefs, and leadership with the dynamic element provided through the interaction of its members (C. E. Nelson, 1988). C. E. Nelson (1988) described a congregation as a place where faith is communicated from past to present, interpreted for present day needs, and where faith is strengthened in each other “by exercising it with people who share the faith” (p. 6). A congregation is a living story (D. E. Miller, 1988). Hopewell (1987) describes the life in the congregation as being “a rich and multilayered transaction” (p. 3) and “astonishingly thick and meaning-laden” (p. 5). Congregations are not only inwardly oriented but are also social institutions that interact with “other units in society: people, organizations, and cultures” (Eiesland & Warner, 1998, p. 40).

Distinctive Cultural Systems

A congregation, as does the larger culture, gives rules of how to greet people, dress, and act, but with their own twist (Ammerman, 1998). Though congregations are

distinctive to their particular religious doctrines, congregations nevertheless use “forms and stories common to a larger world treasury to create its own local religion of outlooks, action patterns, and values” (Hopewell, 1987, p.3). A congregation, as a context, has a culture that includes its history and the stories of its peoples, as well as symbols, rituals, and a worldview, that is created by a group of people in that particular setting and context (Ammerman, 1998). Hopewell (1987) claimed that the regular gatherings of people for religious purposes develop “a complex network of signals and symbols and conventions – in short, a subculture – that gains its own logic and then functions in a way peculiar to that group” (p.5). Creeds, programs and governing structures are not all that hold congregations together; congregations develop their own idioms that produce identity and connectivity at much deeper levels (Hopewell, 1987).

The complexity and distinctive, organic culture of congregations has led others to view and study congregations through the lens of systems theory. Parsons and Leas (1993) viewed the congregation in organizational terms. Steinke (1993, 1996) brought a systems approach to congregational studies understanding the congregation systemically, as a living organism. Congregations are organizations, comprised of many groups, individuals, sub-cultures, and layers. As an organizational system, a congregation is comprised of formal contracts such as policies and constitutions, informal understanding such as verbal understandings, and tacit agreements, which are “habits or patterns people establish as they interact over time” (Parsons & Leas, 1993, p. 9). Parsons and Leas described the organizational responsiveness of congregations as their ability to connect the resources of the congregation with the needs of those both inside and beyond. The organizational responsiveness is what “helps congregations adapt to a changing

environment and renew themselves” (Parsons & Leas, 1993, pp. 1-2). Leaders of congregations, in order to be effective, are to have a “holistic systemic view of the congregation” (Parson & Leas, 1993, p. 3). C. E. Nelson (1998) believed that congregations, as social and corporate institutions, can change. Changes in the congregation, as an organizational system, occur through changing the parts of the system. According to Steinke (1996) “change in one part produces change in another part, even in the whole” (p.4), because “no single element of the whole is thought of as functioning independently of the other components” (p. 6).

Teaching Role of Congregations

Education is one of the functions of congregations. The teaching role of the Christian church, occurs in a particular setting, or context “which is itself part of the world as a whole” (Harris, 1988, p. 247). The context for this is the congregation, “the gathered, corporate, communal body of Christ” (Harris, 1988, p. 247). Through educational programs congregations transmit knowledge of the faith tradition and its application for contemporary life, but also transmit “values that promote community solidarity and continuity” (Ammerman, Carroll, Dudley, McKinney, 1998, p. 8). In addition to sustainable and uplifting contributions to their communities congregations “play an irreplaceable role in the moral education of children and adult members (Ammerman et al., 1998, p. 8).

Dash et al. (2005) drew the conclusion from their studies of the research literature of the initial years of congregational experience that “the theological school should intentionally make the congregation a focus for theological education” (p. 75). Burns (2001) identified one implication from his study as the role that model churches could

have in the training of pastors. One way is for congregations to see themselves as learning organizations (Hawkins, 1997; Watkins & Marsick, 1993). A second way is by developing “programs to expose candidates and pastors of other churches to their ministries” (Burns, 2001, p. 237). Burns mentioned the importance of mentoring, and the need to “identify and discuss the importance of the first church one serves with those entering the ministry” (p. 237). Since the time of his study, congregations have embraced this role (Wind & Wood, 2008). Wind and Wood (2008) reported on congregations that are engaged in the induction, or transition-to-ministry, phase of clergy education. This “practice-centered teaching and learning of ministry is situated in the domain of congregational practice” (Wind & Wood, 2008, p. 33) opening up a whole range of possibilities. Interestingly, young clergy are not the only ones learning. “As every part of a congregation’s life and practice is reflected upon, the clergy, staff , and congregation members discover just how much they have to teach and learn together” (Wind & Wood, 2008, p. 36).

Organizational Learning

The relationship of learning and organizations has drawn considerable study and discussion in the field of organizational theory for over fifty years. Interest in this issue of learning in organizations has roots in the 1950s, but strong interest and expansion did not rise until the 1980s (Easterby-Smith, Crossan & Nicolini, 2000). Huber (1991) documented an extensive evaluation of the literatures through the 1980s, and by the mid 1990s organizational learning had become “an idea in good currency” (Argyris & Schön, 1996, p. xvii). Garvin (1993) called for the need to move beyond the philosophical themes and discussions of learning in organizations and to focus on the “gritty details of

practice” (p. 79) and what he identified as three unresolved issues critical to this field, meaning, management and measurement. By the turn of the twenty-first century, Easterby-Smith et al. (2002) claimed the field to be “established” (p. 783), and reviewed the field in terms of past and present debates. Three main areas described the questions of that time: the nature and location of organizational learning, how to investigate organizational learning, and “territorial disputes between competing concepts” (Easterby-Smith et al. 2000, p. 787). Research and study in the area of the learning organization has since turned to assessment, measurement tools, and links in performance and learning organization strategies (Ellinger, Ellinger, Yang, & Howton, 2000; Holton & Kaiser, 2000; Ya-Hui Lien, Yang, & Li, 2002; Yang, Watkins, & Marsick, 2004).

Defining Learning Organizations

Organizations are “purposeful social systems” (p. xiv) comprised of a collection of individuals (Dixon, 1994). These members are an organization when they have procedures around these three conditions: “1) making decisions in the name of the collectivity, 2) delegating to individuals the authority to act for the collectivity, and 3) setting boundaries between the collectivity and the rest of the world” (Argyris & Schön, 1978, p. 13). Yet, an organization is not a finished product (Nyhan & Kelleher, 2002). Organizations are “small societies composed of persons who occupy roles in the task system” (Argyris & Schön, 1978, p. 28). It is critical to understand organizations as a context for learning (Watkins, 2006), and to see the organization as “a set of knowledge assets deployed through people, process and technology” (Thomas & Allen, 2006, p. 124). The individuals in this collective have developed and stored meaning structures and are “capable of creating new meaning from their interface with their environment and

each other” (Dixon, 1994, p. 36). Furthermore, each individual is able to test one’s meaning structure against current meaning structures and can change or reconstruct their structures of meaning (Dixon, 1994). Each member in the organization is capable of learning, and the “organization learns through this capability of its members (Dixon, 1994, p. 36). However, individual learning does not necessarily imply that organizations learn (Argyris & Schön, 1996).

Clearly, “organizational learning is not the same thing as individual learning, even when the individuals who learn are members of the organization” (Argyris & Schön, 1978, p. 9). Learning in the organization requires that the individuals who learn “take their learning back to the system” (Marsick & Watkins, 1999, p. 12), and “organizations learn only through the experience and actions of individuals” (Argyris & Schön, 1978, p. 9). Organizational learning is “the intentional use of learning processes at the individual, group, and system level” (Dixon, 1994, p. 5), and is “a dynamic process through which people co-construct knowledge” (Marsick, 2000, p. 19). Learning is key, and is distinguished from knowledge, or simply having knowledge. Dixon (1994) claims “organizational learning requires learning rather than being learned” (p. 1).

The terms organizational learning and learning organization were used, often, interchangeably, before the term learning organization had been coined (Ortenblad, 2001). Ortenblad (2001) identified in existing literature two of the most common ways to distinguish between organizational learning and learning organization. In the first of these two distinctions, Ortenblad described organizational learning as that which refers to processes or activities of learning in the organization, and learning organization as a form of organization in itself. In the second instance, the view would hold that all

organizations can have organizational learning, but not every organization would be a learning organization (Ortenblad, 2001). Ortenblad proposed “a distinction based on who or what learns, and secondly a distinction based on where the knowledge exists” (p. 128), referring to the location of knowledge, i.e. individuals, people, routines, symbols. Garvin (1993) described organizational learning as a process unfolding over time and linked it “with knowledge acquisition and improved performance” (p. 80). Argyris and Schön (1978) described organizational learning in terms of the correction of error.

“Organizational learning occurs when individuals within an organization experience a problematic situation and inquire into it on the organization’s behalf” (Argyris & Schön, 1996, p. 16). Watkins and Marsick (1993) indicated specific problems or challenges are the starting point for innovation and productivity in the organization. A learning organization is one that is “skilled at creating, acquiring, and transferring knowledge, and at modifying its behavior to reflect new knowledge and insights” (Garvin, 1993, p. 80), and consciously builds “structures, policies, and practices to support continuous renewal” (Watkins, 2006, p. 10). Nyhan and Kelleher (2002) described the concept of the learning organization as being a complex but necessary learning that is important for the development of core competencies, innovation, and competitiveness “while at the same time nourishing and sustaining the key qualifications of individuals from a broader lifelong learning experience” (213). Though the idea of a learning organization is inspiring, people find it difficult to implement (Marsick, 2000).

Characteristics and Components

“There is no universal blueprint” (Redding, 1997, p. 62) of a learning organization, neither is a one-size-fits-all approach applicable (Marsick, 2000). No pure

ideal learning organization exists. In assessing whether an organization is a learning organization, the question to ask is what characteristics would be ones for the particular organization and its context (Redding, 1997). Garvin (1993) identified five primary activities that learning organizations are skilled at: “systematic problem solving, experimentation with new approaches, learning from their own experience and past history, learning from the experiences and best practices of others, and transferring knowledge quickly and efficiently throughout the organization” (p. 81). Senge (1990) identified five disciplines of the learning organization built on the importance of systems thinking. The other four disciplines are, personal mastery, mental models, building shared vision, and team learning.

Learning, at all levels, individual, team or group, and organizational is key in learning organizations (Senge, 1990; Watkins & Marsick, 1993). Learning within the learning organization is described as being from others (Huber, 1991), through experience and practice (Argyris & Schön, 1978; Garvin, 1993; Hawkins, 1997; Marsick, 2000), embedded in work (Watkins & Marsick, 1993) and is continuous (Argyris & Schön, 1978; Dixon, 1994; Nyhan & Kelleher, 2002; Watkins & Marsick, 1993). Garvin (1993) traced organizational learning through three steps that overlap, cognitive, behavioral, and performance improvement. New insights and experiences expand individuals’ knowledge that becomes internalized to alternative behavior. Behavioral changes lead to improvements in performance that produces better quality, efficiency, and other tangible gains (Garvin, 1993). Three interactive foci enhance organizational learning, critical reflection, collaboration, communication. “The heart of organizational learning is a collective process of learning from experience” (Marsick, 2000, p. 12).

Critical reflection is not common in the workplace, it requires people to engage in dialogue with one another “regardless of status or position in the hierarchy” (Marsick, 2000, p. 12). Learning becomes collectively owned through the sharing of knowledge (Marsick, 2000).

Steps to build learning organizations include fostering an environment that is conducive to learning, opening up boundaries and stimulating the exchange of ideas, and creation of learning forums (Garvin, 1993). Key in the learning organization is that “learning transforms or changes the organization” (p. 9), and “creation of a continuous, deliberative process for change and innovation” (Watkins & Marsick, 1993, p 185). Learning from practice is integral in the learning organization. Studying practices, the way that work gets done, rather than the results is the source of the greatest benefits (Garvin, 1993). It is necessary for people to notice, use, and share ideas, practices, and the thinking of others in order for organizations to learn (Marsick, 2000). The most powerful method of transferring knowledge in a learning organization is through personnel rotation programs (Garvin, 1993). Individuals act “as agents of the organizations who produce the behavior that leads to learning” (Argyris, 1992, p. 8). However, when knowledge is held by individuals it “fails to enter into the stream of distinctively organizational thought and action,” (Argyris & Schön, 1996, p. 6) resulting in organizations knowing less than their members do. A strong base of social capital and trust is needed in the system for organizational learning to function best (Marsick, 2000).

Single Loop and Double Loop

Argyris and Schön (1978) distinguished between two types of learning in the learning organization, single-loop and double-loop. Single-loop learning is concerned

with effectiveness; effectiveness is “the criterion for success” (p. 29). “Single-loop learning typically leads to incremental changes” (Marsick, 2000, p. 9). “In single-loop learning, members of the organization carry out a collaborative inquiry through which they discover sources of error, invent new strategies, and evaluate and generalize the results” (Argyris & Schön, 1978, p. 22). Organizational members “respond to error by modifying the strategies and assumptions within constant organizational norms” (Argyris & Schön, 1978, p. 29), yet, “the norms themselves – for product quality, sales, or task performance – remain unchanged” (p. 18-19).

When learning results in the restructuring of organizational norms along with the strategies and assumptions that undergird these norms, double-loop learning is at work. The response to error in double-loop learning “takes the form of joint inquiry into organizational norms themselves” that leads to the resolution of the inconsistency and makes “new norms more effectively realizable” (Argyris & Schön, 1978, p. 29). As the organization engages double-loop learning, the members reflect and learn about previous contexts of learning and through discoveries of their actions “that facilitated or inhibited learning, they invent new strategies for learning, they produce these strategies, and they evaluate and generalize what they have produced” (Argyris & Schön, 1978, p. 27). “Double-loop learning is more likely to lead to further questions that reframe one’s understanding of the entire situation” (Marsick, 2000, p. 9). A practical distinction holds that single-loop learning “helps get the everyday job done” and double-loop learning “assures that there will be another day in the future of the organization” (Argyris, 1992, p. 9). Another description views single-loop learning as peripheral learning and double-loop as deep learning (Argyris & Schön, 1978).

Learning in and Through Practice

The importance of linking practice and learning in the context of learning organizations is noted. Brown and Duguid (1991) challenged conventional learning theory valuing abstract knowledge over actual practice that results in separation of learning from working, and learners from workers. They argued “the composite concept of ‘learning-in-working’ best represents the fluid evolution of learning through practice” (Brown & Duguid, 1991, p. 41). Learning serves to bridge work and innovation and identify communities of practice as “significant sites of innovating” (Brown & Duguid, 1991, p. 41). Practice, as a term, does not represent the usual dichotomy between the theoretical and the practical. The whole person is involved in practice and engaging both action and knowledge (Wenger, 1998). Practice is the way in which work is done, and how knowledge is created, thus Brown and Duguid (2001) proposed looking at “knowledge and organization through the prism of practice” (p. 200). The actual practices, not the espoused practice of an organization, determine “the success or failure of organizations (Brown & Duguid, 1991, p. 41). Wenger (1998) shared the concept that practice connotes doing, “doing in a historical and social context that gives structure and meaning to what we do. In this sense, practice is always social practice” (p. 47). Sustained pursuit of shared enterprise creates a kind of community over time in which these practices are a property of these communities. “It makes sense, therefore, to call these kinds of communities *communities of practice*” (Wenger, 1998, p. 45).

Drawing from Orr’s ethnographical research with service technicians, Brown and Duguid (1991) described three aspects of work learning, narration, collaboration, and social construction. Narration involves the telling of stories within the complex social

web where work occurs. Telling stories gives aid in diagnosis, and serves to be repositories of accumulated wisdom. Collaboration addresses the communal aspect of learning emphasizing “individual learning is inseparable from group learning” (Brown & Duguid, 1991, p. 46). Social construction reveals shared understanding as both “highly situated and highly improvisational” (p. 47) as participants in a community of practice construct understanding; and secondly, through the storytelling, and construction, personal and group identity is formed. Brown and Duguid (1991) identified the “central issue in learning is *becoming* a practitioner not learning *about* practice” (p. 48). Knowing and learning is situated “in the practices and communities in which knowledge takes on significance” (p. 48).

Hale (1996) promoted a link with mentoring and learning organizations in her article focused on the development of the workforce in public organizations. Distinguishing this from traditional mentoring that matches individuals one on one, organizational mentoring engages multiple individuals within the organization to serve in a mentoring capacity in their specific areas of expertise. Organizational mentoring, Hale described, is a process that “leads to an inclusive mentoring network and an organization’s increased capacity to develop its workforce” (p. 427). Learning organization environments provide the kind of space where organizational mentoring can more readily occur. Her conclusions point to benefits within the organization that include collaboration, engendered trust, increase in initiative, because of using this network of mentorship in the development of the workforce. Pastoral residency programs employ a range of individuals and groups that interact with and provide mentoring to the individual residents. Though Hale is promoting this mentoring process for workforce development

in public organizations, the positive implications of this kind of layered engagement with new employees supports the strength of inductive clergy training in congregational contexts, and the linkage of learning organization concepts.

Battersby (1999) posed that the learning organization creates a new agenda for connecting Continuing Professional Education (CPE). Like the learning organization, CPE “should be emancipatory: that is, its aim is to provide a deeper awareness of the content, purpose and context of professional practice” (p. 61). Though standard approaches to CPE are prescriptive, focused on increasing knowledge for answering how-to questions of practice, and have a tendency to be conducted for the benefit of the providers, Battersby advocated for CPE “that is informed by the emancipatory principles that underpin the concept of the learning organization” (p. 60). The influence of the learning organization challenges the notion that CPE is a “neutral, uncontested enterprise” (p. 60). CPE shaped by concepts of the learning organization would allow professionals not only to discover the factors that prevent them from having influence and by changes affecting their practice, but to be able to work to transform the “conditions which promote disempowerment within organizations and communities” (p. 60). A CPE from the perspective of the learning organization focuses key issues on “autonomy, personal freedom and individual creativity of professionals” (p. 62).

A Model for Application and Understanding

Among the literature of the learning organization, the model of Watkins and Marsick (1993, 1996) is noted as comprehensive, and useful for building and assessing a learning organization (Johnson, 2002; Yang et al., 2004). Marsick and Watkins (1999) described seven action imperatives that build learning organizations. These seven are: 1)

create continuous learning opportunities, 2) promote inquiry and dialogue, 3) encourage collaboration and team learning, 4) create systems to capture and share learning, 5) empower people toward a collective vision, 6) connect the organization to its environment, and 7) provide strategic leadership for learning. The first imperative focuses on the design of work that allows people to “learn from problems, challenges and mistakes” (Marsick & Watkins, 1999, p. 13) while at work on the job, a design of continuous learning that “grows out of the work itself” (Watkins & Marsick, 1993, p. 13). The learning organization will frequently give feedback to its members, and use incentives that promote both formal and informal learning. The second concerns support of skills to think clearly, probe beneath the surface and listen to others as skills “needed to learn more effectively from others” (Marsick & Watkins, 1999, p. 14). Dialogue in this environment connects individual and team learning among open minds and open communication (Watkins & Marsick, 1993). The third imperative points to the need for values to be in place that “support sharing of information across boundaries” (Marsick & Watkins, 1999, p. 14). As communities of practice learn together ideas are spread through these networks. Collaborative work extends “the organization’s capacity to achieve unified action on common goals” (Watkins & Marsick, 1993, p. 14).

The fourth imperative “concerns systems that are needed for knowledge management” (Marsick & Watkins, 1999, p. 14). In these systems, learning must be captured “to keep what is learned in the organizational memory” (Watkins & Marsick, 1993, p. 15). The fifth action imperative supports systems-level learning in several ways through empowerment. “Empowerment puts ownership for the vision into the hands of those who must implement it” and creates reserves in human capacity by increasing

freedom of decision making and movement” (Marsick & Watkins, 1999, p. 14). As individuals become free to experiment and take risks, learning from both results and mistakes occurs. Empowerment increases capacity for members of the organization to have a shared vision of the whole picture, knowledge of how to get things done, and access for planning and assessment (Watkins & Marsick, 1993). The sixth imperative “considers the interface that people have with their environment” (Marsick & Watkins, 1999, p. 14). This includes responsiveness to the work-life needs of the members of the organization as well as responsiveness to the external needs “customers whose needs influence all members of an organization” (Watkins & Marsick, 1993, p. 18). The final imperative “singles out leaders who model and champion learning. They make space for learning” (Marsick & Watkins, 1999, p. 15); furthermore, they “think strategically about how to use learning to create change” and “consciously raise the knowledge capital of the organization” (Watkins & Marsick, 1996, p. 7-8). Pastoral residency programs are designed so that novices learn from their experience, are encouraged to take risks, have interaction with multiple groups within the congregation, and function in a culture focused on continuous learning. The support system seeks to engage them in reflection on their action.

Four barriers in learning organizations are identified (Marsick & Watkins, 1994; Watkins & Marsick, 1993). The inability to recognize and change mental models is a key individual barrier toward the creation of a learning organization. Mental models are “deeply held cognitive, value-based, feeling-fraught frameworks people use to interpret situations they encounter” (Marsick & Watkins, 1994, p. 356). Learned helplessness, a second barrier, “dissipates motivation and inhibits attentiveness to learning opportunities”

(Watkins & Marsick, 1993, p. 242). Learned helplessness “occurs when people have learned over time that they lack control over the consequences of their actions” (Marsick & Watkins, 1994, p.356); it is also created by unrealistic and unachievable goals (Watkins & Marsick, 1993). A third barrier is termed truncated learning in which learning is interrupted, or partially interrupted creating “ghosts of learning efforts that never took root” (Watkins & Marsick, 1993, p. 240). Tunnel vision, lastly, emerges as individuals are unable to see themselves and a situation from a systems point of view and to act accordingly” (Watkins & Marsick, 1993, p. 246). Members of an organization may not see the complexity of the entire situation, or “become frozen into inaction because of the overwhelming complexity of the problem” (Watkins & Marsick, 1993, p. 246).

Environmental Jolts as Learning Stimuli

In Meyer’s (1982) analysis of organizational learning, he investigates how organizations adapt and respond to outside changes he calls “environmental jolts” (p. 515). He defines the environmental jolts as “transient perturbations whose occurrences are difficult to foresee and whose impacts on organizations are disruptive and potentially inimical” (p. 515). They “are transitory blips that probably induce different organizational responses than foreseeable trends or irreversible shifts” (p. 534). Meyer reports on his research with 19 hospitals and provides a description of how organizations adapt to jolts. Organizations respond differently to environmental changes. Meyer claims “some organizations learn during jolts and undergo second-order changes, others rebound untutored to their original states when perturbations cease” (p. 521). Even though these jolts present unwanted challenges that have potential negative outcomes, they can “create opportunities for organizational learning, administrative drama, and introducing unrelated

changes” (Meyer, 1982, p. 532). Jolts plunge organizations into unfamiliar circumstances, and “can legitimize unorthodox experiments that revitalize them, teach lessons that reacquaint them with their environments, and inspire dramas celebrating their ideologies” (Meyer, 1982, p. 535).

The projected challenges of clergy supply that emerged in the late twentieth century became an environmental jolt to seminaries, denominational bodies, and congregations. Various responses to this jolt emerged. Providers of pre-service education increased their focus on enrollments, revised curriculums, and added contextual learning experiences. A model for training and learning developed as seminarians transitioned from the academy to the congregational setting. Teaching congregations became the locale for a new phase in clergy training and development. This inductive phase of clergy education had the support of denominational bodies and institutions as well as congregations. These congregations and the pastoral residency programs they conduct represent organizational responses to the environmental jolt. Congregational learning, organizational changes, and revitalized identities are among the potential outcomes for these congregations. This study is an investigation of one of these specific experiments regarding how it responded to the jolt and specifically, what the congregation learned in this process.

Congregations and Learning Organization Research

The application and use of learning organization research for congregational contexts has only begun to emerge. Hawkins (1997) published a book, *The Learning Congregation: A New Vision of Leadership*, in which he built on the works of Watkins and Marsick, Argyris and Schön, Senge, and adult learning principles and argued for

congregations to utilize the study of learning organizations as necessary for congregational vitality in a rapidly changing culture. Congregations that are learning organizations will show signs of reflection, have cross-functional conversations present within the system, and promote an open flow of knowledge and information sharing (Hawkins, 1997). Leaders in these congregations will be persons that are continually learning and foster environments for learning, and will “have formal, systemic ways to capture information and distribute it widely” (p. 124). Members in these environments will also be continually learning to do new things, and be “equipped to think more complexly, to clarify the mental maps that guide their thinking and acting” (p. 141). “By embedding new knowledge, skill, or values in their cultures, congregations preserve new learning and permanently expand their capacity for more complex behavior” (p. 124). Learning congregations will have clergy that foster learning environments where the members “shape and reshape meaning within a community of practice” (p. 11). Hawkins claimed that congregations become learning organizations in part through leaders that reframe their basic responsibilities and tasks. Pastoral leaders, instead of performing ministry on the congregation’s behalf, “foster learning environments where the whole people of God can shape and reshape meaning within a community of shared practice, continually clarifying those meanings” (p. 11).

Five studies have been identified at this point, appearing in the past since 2000, that apply the learning organization model and dynamics with congregational contexts: “Pastoral behaviors that create or maintain a team learning atmosphere in the church,” (Collier, 2000); “Cognitive complexity and the learning congregation,” (Fleischer, 2004); “From individuals to corporate praxis: A systematic re-imagining of religious education,”

(Price, E. B., 2004); “The ministering community as context for religious education: A case study of St. Gabriel's Catholic Parish,” (Fleischer, 2006); “Learning organization attributes and organizational performance: Is there a relationship in church congregations?” (Panosh, 2008).

Collier (2000) investigated the specific behavior pastors practiced that encouraged a team learning atmosphere in the church based on the team learning discipline in Senge's work. He interviewed twenty pastors in selected congregations in his doctor of ministry dissertation. Through his study he identified six behaviors which help to create or maintain an atmosphere of team learning in the church. Pastoral leaders who value team learning, model this approach, lead teams to enter into dialogue, give permission to risk failure in attempts to new methods, coach strategies of team learning among members, use specific team oriented language, and create an atmosphere of team learning. The study highlighted the role and importance of pastoral leadership that is committed to and fosters the discipline of team learning in order for the congregations to maintain a learning environment in the congregation.

Citing works that advocated for a systemic view and approach to religious education Fleischer (2004) laid a foundation for the use of learning organizations to promote corporate learning and advocate for the move away from the individual focused approach to religious education to a corporate or communal approach. Fleischer (2004) based her approach using Senge's model of five disciplines of the learning organization. She advocated using the disciplines of the learning organization, as set forth by Senge's work as a conceptual framework for religious education. The focus of her investigation was to encourage religious educators, as parish leaders, to use a collective, collaborative

approach to planning. By employing critical reflection, and developing skilled facilitators who can help communities become more dialogical in their ‘team learning’ disciplines,” the critical foundations are laid for “the emergence of learning dynamics in congregations” (Fleischer, 2004, p. 331). Using the model of the learning organization will enable religious educators to “become more empowered to guide their congregations in developing the disciplines they need to clarify and continually expand their capacities for realizing their transformative missions in the world” (Fleischer, 2004, p. 332).

E. B. Price (2004) based her study using Hawkins (1997) work and definition of learning congregations, and Senge’s work on learning organization to “examine the relationship of individual cognitive complexity to the cognitive complexity and functioning of what are known as learning congregations” (Price, 2004, p. 358). E. B. Price investigated the cognitive maturity of individuals in learning congregations stating in her premise that the demands and expectations of learning congregations “require the kind of cognitive maturity in persons identified and described by Robert Kegan as *fourth order* thinking” (Price, 2004, p. 361). For congregations to be learning congregations, individuals in the congregation should know themselves to be co-creators of the congregation’s culture and the shaping of its decisions and life, engaging together in the shared practice of ministry” (Price, 2004, p. 364). She concluded that cognitive complexity is not necessary for the entire membership, but that there is “some critical mass of flexible thinkers” (Price, 2004, p. 368), and that the environment is one that encourages others in this manner of thinking process. She concluded that the presence of some can influence and lead the whole.

Fleischer (2006) returned to exploring the dynamics of the learning organization using Senge's work. This was a case study aimed at uncovering "the systemic dynamics of learning in one ministerially active congregation" (p. 110). Fleischer identified that the small groups and teams of leaders and volunteers that comprise the congregation are the places where action-reflection occurs, and that the crucible of community "fostered a strong sense of shared mission, developed through parish-wide discussions and 'dreaming' sessions" (p. 120). The study indicated that involvement in ministry of the congregation led to personal learning, a foundational piece of organizational learning through action-reflection and dialogue among the practicing communities.

Panosh (2008) extended the application of the organizational learning impact on organizational performance needs to non-profit organizations, specifically congregations. The purpose of the study was to determine if there was any relationship between learning organization attributes and organizational performance, and to address this in the context of the shrinking market share of the mainline denominations in the United States. In this study he identified possible links of the church organization with the learning organization attributes proposed by Watkins and Marsick using the Dimensions of the Learning Organization Questionnaire (DLOQ), an instrument developed and reported in Yang et al., (2004).

Summary

The education and preparation of clergy for service in congregations continues as an important and innovative endeavor in theological education. In recent decades, a renewal of interest in preparation for practice of ministry within seminary training has led to creative programs of clergy training for practice, some extending beyond graduation as

residency programs within congregations. These programs integrate action and reflection emphasizing the learning that occurs in and through work, or practice. Pastoral residencies and the inductive training of clergy within congregations is one of the recent developments in the training of pastoral leadership. Congregations, as do organizations, have cultures, operate as systems, and include participants functioning at all levels. In these systems, meaning is constructed through interaction, reflection and engagement in practice. Application and use of learning organization frameworks and theory in congregational studies is emerging as a useful, informative, and revelatory tool. This study will continue application of the learning organization in congregational contexts as not only a tool for investigating congregations, but also to identify what and how learning occurs from creative approaches to environmental changes.

Residency programs are designed with team approaches, peer groups, communities of practice and mentoring by individual leaders as well as groups. Pastoral residents, while a key focus of learning and skill acquisition in this inductive phase of clergy education, are not the only ones learning. Fleischer's (2006) study points to the assumption that for a congregation, and in particular the congregational members, involved in the practice of teaching clergy, personal learning and shared team learning will most probably occur. Using the framework of the learning organization, and what is necessary to build a learning organization is appropriate for probing the how and what questions regarding learning within congregational contexts engaged in the inductive phase of clergy education. By using the learning organization framework of Watkins and Marsick (Marsick & Watkins, 1999; Watkins & Marsick, 1993, 1996) this study will inquire into the ways in which congregations learn and what they learn as they engage in

the inductive phase of clergy education. By searching for what congregations may learn, and the factors that aid or hinder their learning, congregational leaders will be encouraged to view their organizations as environments of learning. Congregations, as learning organizations, will become strengthened as leaders are aided in their ability to become intentional about serving as creative and effective teaching and learning contexts.

CHAPTER 3

METHODOLOGY

The purpose of this study is to explore how teaching congregations learn in the process of facilitating the training and development of beginning clergy in the inductive phase of clergy education. The research questions guiding this study are as follows: (1) What is the learning that the congregation does in the process? (2) How does the congregation learn? (3) What factors facilitate or impede the learning of the congregation? (4) What changes in structure, roles, and organization, if any, occur? This chapter addresses the methodology used in the study. The chapter is organized into the following sections: design of the study, sample selection, data collection, data analysis, validity and reliability, and assumptions and limitations.

The Design of the Study

Designing a research study entails addressing four elements that give shape and justification for the project (Crotty, 1998). First, the research methods are those concrete techniques and procedures chosen to gather and analyze the data. Secondly, these methods are governed by a strategic plan of action, the methodology, “linking the choice and use of the methods to the desired outcomes” (Crotty, 1998, p. 3). Thirdly, methodology is informed by the assumptions regarding reality, the theoretical perspective that provides the context for the methodology and grounds its logic and criteria. Lastly, embedded in the theoretical perspective is epistemology, the theory of knowledge.

Following is brief orientation to these four elements pertaining to this study, beginning with the epistemological.

Epistemology and Theoretical Prospective

The epistemological stance for this study is constructionist. As defined by Crotty (1998) the constructionist view holds that “all knowledge, and therefore all meaningful reality as such, is contingent upon human practices, being constructed in and out of interaction between human beings and their world, and developed and transmitted within an essentially social context” (p. 42). In the constructionist view, meaning is constructed, not discovered. In other words, the pursuit of meaning is not an archeological expedition. Instead, the search is to determine how individuals, groups, and/or organizations have constructed meaning within and through their contexts. There is not one true or valid interpretation, instead what emerges are useful interpretations (Crotty, 1998).

The theoretical perspective providing the context for the study is hermeneutics. Hermeneutics, since its emergence in the seventeenth century, “has referred to the science or art of interpretation” (Grondin, 1991, p. 1) and understanding that includes the exposing of hidden meanings, yet there is no absolute or universal definition of hermeneutics (Byrne, 1998). Originally conceptualized as a means for studying written texts, especially in the discipline of biblical interpretation, “hermeneutics is about the theory and practice of interpretation, about the bringing of understanding into language” (Moss, 2005, p. 265). Texts are a “means of transmitting meaning – experience, beliefs, values – from one person or community to another” (Crotty 1998, p. 91). Through the work of Schleiermacher, Droysen, Dilthey, Heidegger, Gadamer and others (Grondin, 1991), the application of hermeneutics has been extended to unwritten sources such as

“human practices, human events, human situations – in an attempt to ‘read’ these in ways that bring understanding” (Crotty, 1998, p. 87).

The interpreter has a two-part obligation, which Gadamer (1976) refers to as the hermeneutic attitude. The first assumptive stance is to view the text, written or unwritten, as being coherent with a sense of meaning (Moss, 2005). Secondly, the interpreter holds the belief that he or she has something to learn from the text (Moss, 2005). In doing interpretation the interpreter cannot suspend or displace the fore-knowledge brought to the interpretation of the “texts.” Thus, hermeneutics, and the hermeneutic circle, acknowledges that there is “a circular relation between interpretation and understanding” (Grondin, 1991, p. 97). According to Crotty (1998) a “way to conceptualize the hermeneutical circle is to talk of understanding the whole through grasping its parts, and comprehending the meaning of the parts through divining the whole” (p. 92). Both the text and the interpreter are situated in their socio-cultural traditions emphasizing “the sociocultural and historic influences on inquiry” (Bryne, 1998, p. 1). The process is repeated continually in our familiar experience. “There is always a world already interpreted, already organized in its basic relations, into which experience steps as something new, upsetting what has led our expectations and undergoing reorganization itself into upheaval” (Gadamer, 1976, p. 15). The task, however, of hermeneutics is not about avoiding misunderstanding; the reverse, according to Gadamer, is the case.

The context of the congregation as the focus of this study of the inductive-phase of clergy education is a crucial element. Congregations, as contexts, are steeped in history and tradition, both in the span of time of the Christian tradition as well as the local tradition and history of a particular congregation. As knowledge is constructed, this

qualitative study seeks to gain understanding of the learnings that have occurred for staff and laity, recognizing that these are occurring within the congregational tradition of which they have experience, both prior to residency programs and through these programs.

Methodology and Methods

The constructionist view for understanding and interpretation of meaning leads to a qualitative approach to this study. Patton (2002) claims that various philosophical and theoretical perspectives contribute to the influence and distinctive types of qualitative inquiry, furthermore, “qualitative inquiry is no single, monolithic approach to research and evaluation” (p. 76). Schwandt (2007) claims that labeling a research activity as qualitative inquiry “may broadly mean that it aims at understanding the meaning of human action” (p. 248). By focusing on smaller samples, selected purposefully and considered information-rich, qualitative methods can “permit inquiry into and understanding of a phenomenon *in depth*” (Patton, 2002, p. 46). Qualitative research seeks to uncover meaning, rather than giving focus to cause and effect, or predictions, and intends to provide understanding of the meanings people construct (Merriam, 2009). Qualitative inquiry provides for descriptive data that can tell a story, and can “capture and communicate someone else’s experience of the world in his or her own words” (Patton, 2002, p. 47). Creswell (2007) identifies common characteristics of qualitative research as follows: natural setting, researcher is key instrument, using multiple sources of data, inductive data analysis, focus upon participants’ meanings, an emergent design, use of theoretical lens, interpretive inquiry, and providing a holistic account.

A major characteristic of qualitative research is for researchers to collect data in the actual setting, or site, “where participants’ experience the issue or problem under study” (Creswell, 2007, p. 37). Data collection is not done in a controlled environment or lab, thus, the researcher has the opportunity for face-to-face interaction with participants within the actual environment related to the study. The researcher becomes the key instrument because of doing the actual data collection, and usually gathers data from multiple sources such as interviews, observations, and documents, rather than rely on any single source of data. Multiple sources are reviewed, working back and forth between themes that emerge through an inductive process. The qualitative process is focused on drawing out the meaning that the participants hold and not the meaning brought to the process by the researcher or from the literature (Creswell, 2007).

The process is described as emergent meaning that “the initial plan for research cannot be tightly prescribed, and that all phases of the process may change or shift after the researchers enter the field and begin to collect data” (Creswell, 2007, p. 39). Qualitative studies are often viewed through a theoretical lens. The inquiry in qualitative research is interpretive, because the researcher makes an interpretation of the participants’ meanings and discoveries made in the study. Therefore, the research report includes both the meanings of the participants and the interpretations of these meanings by the researcher. Researchers intend to develop what Creswell (2007) calls a “holistic account” (p. 39) reporting on the multiple perspectives and many factors involved in the situation. Furthermore, qualitative research looks not for cause-and-effect relationships among these factors, but rather is interested in identifying the complex interactions of factors” (p. 39) of these situations.

Case Study Research

The strategic plan of action methodology for this qualitative study will be to employ case study research. Case study research here is distinguished from casework, case method used as teaching devices, case histories or cases used as a form of record keeping (Merriam, 2009; Yin, 2009). The use of case study for this research study defines a case as “an in-depth description and analysis of a bounded system” (Merriam, 2009, p. 40). Yin (2009) identifies three conditions that direct selection of the type of research strategy to be employed in a study. These are: “(a) the type of research question posed, (b) the extent of control an investigator has over actual behavioral events, and (c) the degree of focus on contemporary as opposed to historical events” (Yin, 2009, p. 8). The case study strategy is an appropriate selection when the research question is focused on a how or why inquiry, the investigator has no control over the behaviors of the individuals, groups, or organizations being studied, and the focus rests upon more contemporary rather than historical events. This study proposes to investigate how learning occurs in teaching congregations that are engaged in pastoral residency programs. Furthermore, the investigation will seek to learn about the behaviors of individuals within the organization, and the behavioral changes, if any, occurring in the organization. Finally, the phenomena of pastoral residency programs, and congregations engaged in an inductive phase of clergy education is a contemporary event in the scope of clergy education.

Yin (2009) identifies three types of case studies, explanatory, exploratory, and descriptive. Stake (1995) describes three basic choices or reasons for engaging in case study research, intrinsic, instrumental, and collective. The case study approach is being used here in order to increase understanding about how congregations, as organizations,

learn in and through this process of serving as a teaching congregation. Merriam (2009) highlights three special features for defining case studies. “Qualitative case studies can be characterized as being particularistic, descriptive, and heuristic” (Merriam, 2009, p. 43). By focusing on a particular situation, event, program, or phenomenon, the individual case “is important for what it reveals about the phenomenon and for what it might represent” (Merriam, 2009, p. 43). The unit of analysis of this case study will be the congregation. The theoretical framework is organizational learning and the study of the congregation as a learning organization. The case study, as a research method, is a particularly relevant method for this research project because of the intent to study the congregation as a system (Ellinger, Watkins, & Marsick, 2005).

Sample Selection

The sampling approach for this qualitative study is nonprobability sampling. Nonprobability sampling is called theoretical, purposive, or purposeful sampling (Merriam, 2009; Patton, 2002; Schwandt, 2007). This form is “based on the assumption that the investigator wants to discover, understand, and gain insight and therefore must select a sample from which the most can be learned” (Merriam, 2009, p. 77). Purposeful sampling involves selection of individuals and sites for study that are information-rich and because they can provide a purposeful and illuminating understanding of the research problem and central phenomenon in the study (Creswell, 2007; Patton, 2002). Sample units in purposive sampling are chosen based on their relevance to the research question rather than their representativeness and because the particular setting can shed “light on the issues that the researcher is seeking to elaborate” (Schwandt, 2007, p. 270). Sample size varies in qualitative research depending on the nature and purpose of the study as

well as the variables of available time and resources (Patton, 2002). However, the two objectives of random sampling hold true in case study research as well, (1) a representative sample, and (2) useful variation on the dimensions of theoretical interest” (Seawright & Gerring, 2008, p. 296).

Rationale for Case Study Sampling

This study employed a single case study approach. Case study research seeks first to understand the case of interest, not other cases (Stake, 1995). Stake (1995), Patton (2002), and Yin (2009) provide various rationales for justification of selection of a single case for investigation. A single case selection for this study was applicable because individual cases can contain particular or intrinsic interest, and serve to be instrumental in yielding understanding beyond the particular case itself (Stake, 1995). Patton justifies single case selections that are rich in value because their outstanding failures or successes make them special or unusual. Patton describes this as intensity sampling, whereas Yin (2009) describes such cases as extreme. An intense case would select “excellent or rich examples,” though not “highly unusual cases” (Patton, 2002, p. 234). Furthermore, use of a single case is justified when a case has particular importance for the area of interest, and can provide strong possibility of replication. Selection of a single critical case includes the strategy of selecting a site with the potential to “yield the most information and have the greatest impact on the development of knowledge” (Patton, 2002, p. 236). Finally, researcher accessibility and an environment hospitable to inquiry and with willing participants provide justification in use of single case strategy (Stake, 1995). The study of a single case may not allow for broad generalizations to all possible cases,

however, “*logical generalizations* can often be made from the weight of evidence produced in studying a single, critical case” (Patton, 2002, p. 236-237).

Criteria

The *Becoming a Pastor* report from the Alban Institute identified approximately 34 programs for the training of clergy in the inductive phase of clergy education. The various programs were grouped into three primary descriptive categories in the report. Congregation-based programs, one of the three categories identified, is the focus of this study. These teaching congregations provided a two-year residency program where seminary graduates serve in a salaried full-time position. Each of the congregation-based programs in the report employed at least two, and as many as four pastors, that allowed for “peer learning and shared reflection on the experience” (Wind & Wood, 2008, p. 21). Additionally, a network of people including one or more pastoral staff, and lay committee participants combined in the mentoring of the residents.

The congregation selected from this group of congregations as the single case for this study had to be a congregation with a demonstrated commitment to the training and development of young clergy in the inductive phase of clergy education. Additionally, the congregation was to have responsibility for management of and coordination of the program. The qualifying congregation needed to have completed at least two full, two-year cycles with pastoral residents. Completion of two cycles provided possibilities for learning from mistakes and building upon successes from one cycle to the next. Furthermore, two cycles would increase the experiences of the congregation with this inductive phase of clergy training and development. Qualifying congregational residency programs needed to include peer group experiences for the residents, and mentor

relationships with a pastor, or full-time ordained member of the staff. The program of pastoral residency in the congregation was also to include lay member participation and interaction with the pastoral residents. A lay committee that served to guide, support, and advise the pastoral resident was necessary. Pastoral residents were to have experiences in all aspects of the church's life and ministry, including worship leadership, specific responsibilities in ministry areas, and exposure to governing boards and bodies in the church. Finally, the congregation selected was to have been included among the congregations identified in the *Becoming a Pastor* report.

Sample

The sample selected for this case study was Wilshire Baptist Church in Dallas, Texas, one of the congregations described in the *Becoming a Pastor* report. *Pathways to Ministry* is the name of the congregation's comprehensive approach of fostering, developing, nurturing, and sustaining individuals toward ministerial vocation. A program administrator serves to manage and coordinate Pathways to Ministry, which includes four distinct components, with the pastoral residency program being the largest and most significant. Table 1 provides a brief overview of overall program.

Table 1
Pathways to Ministry Components

<i>Pathways to Ministry</i>	
<i>YourCall</i>	A program of vocational discernment designed to introduce high school students to the concept of vocational ministry
Ministry Interns	Internships are offered in the summer months for college students
Seminary Stipends	A financial stipend of support from the congregation for any Wilshire member attending seminary or divinity school
Pastoral Residents	2 Year residencies for seminary graduates

The congregation accepted the first pastoral resident in 2002 and *Pathways to Ministry* was operating in 2003 with the first grant from the Lilly Endowment. The congregation received a second grant in 2006, and a third grant in 2011 that will continue their commitment as a teaching congregation through the year 2015. The congregation has demonstrated a continued commitment to the training and development of young clergy and at the time of this study had graduated 15 residents through multiple cycles. Residents rotate through the ministry areas of the congregation including worship, education, stewardship, missions and evangelism, and pastoral care in a system akin to a medical hospital program (Mason, 2007). These six areas of rotation are specifically identified as worship, discipleship, fellowship, witness, ministry, and stewardship. The program includes a resident supervisor, support from host families, faith partners, lay mentoring committees and regular meetings for review and feedback to both the resident and the program supervisor. Additionally, residents participate in two weekly seminars as peers in learning. The points of contact and involvement by the congregation in this residency program with each new resident include a Sunday school class welcome and assistance in finding housing, filling the pantry, and becoming acclimated to the city. Each resident has a faith partner who relates through friendship and prayer support. A lay mentoring team of five to six church members meets on a monthly basis with the resident. Congregational resources for medical help, tax support, financial planning, to name a few, are available to the residents, as well as mock search committees in order to build interview skills. Additionally, the ministerial staff provides orientation services and help to the residents. These residents, according to Mason (2007) are “practicing ministry in a reflective community” (p. 6).

This particular case meets, and exceeds, the criteria laid in Table 2. The *Pathways to Ministry* program at Wilshire Baptist Church appeared to be a source of rich information as a teaching congregation engaged in the training and development of clergy. This special case had demonstrated success, and had potential to contribute to the knowledge of pastoral residency programs and their impact upon teaching congregations. As an exemplary case, this congregation also expressed an interest and willingness to participate in the study.

Table 2
Sample Criteria

Criteria Outlined	Wilshire Baptist Church
Demonstrated commitment to training and development of clergy	Listed in the <i>Becoming a Pastor</i> report; began Pathways to Ministry program in 2003 with first Lilly Endowment grant; awarded a third grant that began in 2011
Responsibility for managing and coordinating the program	Employs a program coordinator; that serves to manage and coordinate the residency program
Completion of at least two full, two-year cycles with pastoral residents	Graduated at least 15 residents through multiple cycles
Peer group experiences for the residents	Residents participate in two weekly seminars as peers in learning.
Mentor relationships with a pastor, or full-time ordained member of the staff	A supervisor for the resident from the ministerial staff
Lay member participation and interaction with the pastoral residents.	A lay mentoring team of five to six church members meets on a monthly basis with the resident. Additional support from host families, faith partners, lay mentoring committees and regular meetings for review and feedback to both the resident and the program supervisor.
Pastoral residents should have experiences in all aspects of the church's life and ministry, including worship leadership, specific responsibilities in ministry areas, and exposure to governing boards and bodies in the church	Residents rotate through ministry areas: worship, discipleship, fellowship, witness, ministry, and stewardship

Criteria Outlined	Wilshire Baptist Church
Researcher accessibility, hospitable environment and willing participant	Senior Pastor has expressed an interest and willingness for congregation to participate in the study

Data Collection

Findings from qualitative research can come from one or more of four basic types of data collection: interviews, observations, documents (Patton, 2002; Merriam 2009) and audiovisual materials (Creswell, 2007). Multiple sources for data collection strengthen case study research (Yin, 2009). In order to uncover meaning, develop understanding and discover “insights relevant to the research problem” (Merriam, 2009, p. 86), this study collected data by utilizing interviews and documents.

Interviews

The interview process was selected because of its potential to provide “in-depth knowledge from the participants” (deMarrais, 2004, p. 52) about their experiences and to discover their particular views. In the interview process “a researcher and participant engage in a conversation focused on questions related to a research study” (deMarrais, 2004, p. 55). Although the interview is approached as a conversation, it is different from everyday conversation between two people because the researcher, intending to generate data for the study, “tends to have a greater stake in the whole process” (deMarrais, 2004, p. 55). Semistructured interviewing is well suited for qualitative research because this format assumes “that individual respondents define the world in unique ways” (Merriam, 2009, p. 90). A semistructured approach includes a smaller section of structured questions intended to gather specific information from all the respondents and a larger section that is “guided by a list of questions or issues to be explored” (Merriam, 2009, p.

90). However, the exact wording and the order of the questions is not necessarily determined ahead of time. Guidelines for questions as set forth by deMarrais (2004) include making questions that are short and clear that will lead to detailed responses from participants, questions asking for specific events or experiences that can provide for fuller narratives, and inclusion of broad, open-ended questions. Open-ended interviews offer individuals “the opportunity to respond in their own words and to express their own personal perspectives” (Patton, 2002, p. 348) through direct quotations.

For this case study staff members, congregation members, and residents were interviewed. Criteria was developed and outlined for selecting individuals for interviews. Contact was made with the *Pathways to Ministry* Administrator for assistance in identifying individuals for interviews and scheduling. The interview criteria was organized into a table and provided to the Program Administrator who subsequently selected and scheduled the interviews for five staff, five church members, and one current pastoral resident. See Table A2 and Table A3 for examples. The Program Administrator recommended three names of alumni residents for a twelfth interview.

The following individuals were selected and interviewed. See Appendix C for interview guides. The Senior Pastor, who serves as leader of the staff and gives overall guidance to the church and the pastoral residency program, was interviewed. He was also responsible for initiating the residency program in the congregation. The *Pathways to Ministry* Administrator has a unique perspective on the value of the program, keen understanding of the workings of program in the congregation, and its impact on the congregation as a whole. Two ministry area staff were interviewed. The Minister of Music has ministry and administrative responsibilities. The Minister of Business

Administration serves in both an administrative and ministry capacity. Though the residency program was in place when they joined the staff, they have been with the program for more than half of its existence. This tenure length provided a valuable perspective for speaking to the impact of the residency program in the congregation. Additionally, each have knowledge of the areas in which residents serve on a rotational basis (Worship, Discipleship, Fellowship, Witness, Ministry and Stewardship), and have relationships and contact with the members, allowing for them to have perspectives on the effects of the residency program upon specific areas of the church's ministry. Finally, the Associate Pastor, having a broad perspective on the overall ministries of the congregation, how they are integrated within the congregation, and responsibilities for the coordination and cooperation of the ministries of the church, was interviewed.

Individual interviews were also conducted with lay members of the congregation. Two congregational members served as members of a Lay Mentoring Committee. One served during the first three years of the residency program; the other individual served within the last three years of the program. Members of the Lay Mentoring Committee are congregation members with direct and ongoing contact with the pastoral resident. They offer feedback to the resident from a church member perspective, which can be different from a staff perspective. Additionally, two church leaders were selected for interviews. One church leader was currently serving as chair of the deacons, and previously served as chair of the finance committee. He had been a member of the church prior to the beginning of the residency. The other church leader served as deacon chair during the second year of the pastoral residency program and had been involved as a chair of a lay mentoring committee early in the residency program. Church leaders have a vantage

point of having responsibility for key church functions, overseeing any changes to the church policy, structure, and/or function. As a leader of a group, these individuals have opportunity for observance of any learning that moves from the individual level into the group level. A fifth church member was interviewed who was a member in the church when the Pastor Emeritus was the Senior Pastor. She has been involved in the residency from its very beginning.

Individual interviews were conducted with pastoral residents, also. The perspective of a pastoral resident, for whom the program is focused, is a crucial perspective. As a recipient of learning, as well as provider of ministry and learning, a pastoral resident has a perspective of the congregation as a teacher and a learner. Each resident has an important story to tell; and, as a newcomer to the system has an objective vantage point. However, a resident participates in the congregation for only two years. The laity and staff are there in the congregation across the span of multiple residents. Learning in the congregation, as an organization, was anticipated as building over time and as a result of multiple cycles of residents entering and completing the program. Therefore, as this study is focused on the congregation learning as an organization rather than the benefits of the program for residents, more staff and laity were interviewed than residents. Two pastoral residents were included in the individual interviews. One resident was currently engaged as a pastoral resident serving in his second year. The alumni resident selected for interview had completed the program two years prior to the interview. She was serving at the time of the interview as a pastor of a congregation in another state.

The schedule for conducting the interviews required only one site visit to the congregation in Dallas. All of the staff interviews, laity interviews, and one resident interview were conducted over a three day period. Appendix C contains the interview guides used in these interviews. The Program Administrator received a table with the criteria list of desired interviewees. This table, Table A2, can be found in Appendix A. Table A3 summarizes the desired order for the interviews and the number of interviews for each day in a proposed schedule. The final interview, with the alumni resident, was conducted at a later date. Appendix C contains the interview guide used. This interview was scheduled separately, and directly. Separate travel arrangements were required.

Pilot Study

A pilot study was conducted for the refinement of the data collection plan (Yin, 2009) and to sharpen the skills of the researcher for this particular study. The criteria for selecting the pilot case did not match the exact criteria of the selected case of this study (Yin, 2009). Contact was made to the McAfee School of Theology. McAfee coordinated a Pastoral Residency Program under grant money from The Lilly Endowment. This source was of first priority because the congregations that partnered with McAfee to engage in inductive clergy education were viewed as teaching congregations. McAfee's program was one of the programs included in the *Becoming a Pastor* report. Furthermore, the congregations available through McAfee were congregations that made for greater accessibility. First Baptist Church of Gainesville, Georgia was selected as the teaching congregation for the pilot study. This congregation had two residents that each served for 2 years. The residents did not serve at the same time.

Two interviews were conducted at the pilot teaching congregation, one staff member and one laity member. The staff member was the Senior Pastor who served in the role of the mentor for the two residents. The laity member had served on the lay mentoring committee. Data collected from the pilot was used to refine the line of questions and to strengthen the design of the study (Yin, 2009). Interview guides had been developed and used for pilot interviews. Interview Guide A used with the pastor and Interview Guide B used with the lay person are included in Appendix C.

The pilot study provided useful insight for making revisions to the interview guide. The language in the pilot interview guide asked what the interviewees “learned.” Responses were focused on aspects of the program and benefits of the program. The choice was made to ask interviewees for the study what the experience “taught” them. The questions were simplified and framed in a direct manner in order to focus on the participants’ experiences. Secondly, three primary areas of probing were identified as a means to obtain their view on what this experience in pastoral residency taught them: (1) as an individual, (2) about ministry, and (3) about church life. As a result, their responses became more personal. This revised approach of inquiry surfaced their stories and produced longer narratives, while also drawing out the learnings people experienced. Table 3 provides a side-by-side view of the pilot interview guide and the revised interview guide used with the interviewees in the case study.

Table 3
Interview Guide Comparison

Interview Guide Used for Pilot and Revised Interview Guide for Study	
Interview Guide B – Pilot Interview Guide for Lay Person	Interview Guide D - Interview Guide for Wilshire: Staff and Laity
<ol style="list-style-type: none"> 1. When you reflect back on your experience with this committee, what do you know now that you did not know that is important for young clergy to learn? 2. An experience with a group, over an extended period of time, usually leads to a variety of discoveries. Describe something you learned about your congregation that you did not know prior to being involved in this committee. 3. Often times a group doesn't begin to gel, and go deeper, until some time passes, or a particular event or experience occurs. Describe when you experienced a turning point in the group, and what happened. 4. Was there ever a time when a conflict or crisis arose with the committee? If so, describe what happened and how it was handled. (When did you experience a time of real difficulty on this committee.) 5. What did the committee learn from any mistakes that have been made? 6. Describe a time when you realized that this residency program was making a difference for the congregation. 7. How has this residency program impacted you? 	<p>Introductory Question: Tell me how you have been involved with the <i>Pathways to Ministry</i> Program at Wilshire Baptist Church.</p> <p>Primary Question 1: What has this experience taught you?</p> <p>Primary Question 2: What has this experience in pastoral residency taught you about ministry? (Listening here for descriptions on ministry in the church, the role of clergy in the church, relationships with clergy and laity)</p> <p>Primary Question 3: What has this experience in teaching and training young clergy taught your church?</p>

Documents

The second method of collecting data in this study was the use of documents from the congregation. Documents “constitute a particularly rich resource of information about

many organizations and programs” (Patton, 2002, p. 293) and are a “ready-made source of data easily accessible to the imaginative and resourceful investigator” (Merriam, 2009, p. 139). Documentary sources can include written materials, digital materials, photographs, and other physical materials. These materials can reveal information and actions that occurred prior to the researcher’s presence and “goals or decisions that might be otherwise unknown” to the researcher and “provide the evaluator with information about many things that cannot be observed” (Patton, 2002, p. 293). Documents are “not dependent upon the whims of human beings whose cooperation is essential for collecting good data through interviews and observations” (Merriam, 2009, p. 139). Documents tend not to be developed for research purposes; thus they may not be in a form typically useful to the researcher, and documentary materials, even public ones, can have built in biases not evident to the researcher. Nonetheless, documents are a good source of data and “may be the best source of data on a particular subject” (Merriam, 2009, p. 155).

Using documentary resources in data collection is advantageous for several reasons. Documents are usually “easily accessible, free, and contain information that would take an investigator enormous time and effort to gather otherwise” (Merriam, 2009, p. 155). Data contained and gathered from documents can provide “descriptive information, verify emerging hypotheses, advance new categories and hypotheses, offer historical understanding, track change and development” (Merriam, 2009, p. 155). Another advantage to using documentary material is its stability, in part because unlike interviews and observations, the researcher “does not alter what is being studied” (Merriam, 2009, p. 155).

The documents collected as data in this study were those “that have been produced without any direct involvement on the part of the researcher, produced for other purposes” (McCulloch, 2004, p. 2). Documents from the congregation included policies and documents reflecting the structure and operation of the church prior to the congregation’s first residency experience and current documents reflecting church structure. Public materials such as church newsletters and publicity and informational materials about the church were also gathered. Specific documents related to the *Pathways to Ministry* program outlining the function of the program, descriptions and publicity of the program, and reports were obtained. Additionally, reports and communications to the funding organization regarding the *Pathways to Ministry* program were reviewed. An outline of requested documents and justifications was given to the Program Administrator prior to the visit and is produced in Table A4 in Appendix A.

Data Analysis

Data analysis in qualitative research is a sense-making and data reduction “effort that takes a volume of qualitative material and attempts to identify core consistencies and meanings” (Patton, 2002, p. 453). This process in meaning making “involves consolidating, reducing, and interpreting what people have said and what the researcher has seen and read” (Merriam, 2009, p. 176). It “typically demands immersion in the collected data, openness and conceptual flexibility to perceive the patterns, and a great deal of information processing” (Ruona, 2005, p. 236-237). The qualitative process entails “sensing themes, constant comparison, recursiveness, inductive and deductive thinking, and interpretation to generate meaning” (Ruona, 2005, p. 236). This process of meaning making begins with “perceiving patterns from seemingly random information”

(Ruona, 2005, p. 236). The constant-comparative process, by making comparisons throughout each stage of analysis between data, codes, and categories, advances conceptual understanding as the analytic properties of the categories are defined then treated to rigorous scrutiny (Charmaz, 2006). This process of constantly comparing allows the researcher to “more fully and cogently understand” (Ruona, 2005, p. 237) what the participants mean. Analysis of data should be a process that is simultaneous with the collection process (Glense, 2006; Merriam, 2009; Ruona, 2005). This recursive method ensures critical reflection and continual learning throughout the process so that “learning is being used to conduct better research” (Ruona, 2005, p. 237). Data analysis in qualitative research is inductive beginning with bits and segments of data and searching for themes and connections. Near the end of the study, the search shifts to a more deductive stance as the researcher checks whether categories derived from earlier data stand up as subsequent data is analyzed (Merriam, 2009). This activity of analysis is more than a process of manipulating data. Through deep and repetitive thinking about the data, a researcher moves beyond the data offering personal ideas about the data. This “creative, intellectual work of interpretation” leads to the generation of meaning (Ruona, 2005, p. 239).

For this study I followed the model of data analysis set forth by Ruona (2005). The analysis of data in this model followed a succession of four major stages, data preparation, familiarization, coding, and generating meaning. Preparation of the data included transcriptions of interviews, field notes, organization of the materials, and proper storage and preservation. The second stage included reading and rereading the data as well as making notes in ways to become familiar with the material. Coding, “a

progressive process of sorting and defining and defining and sorting” (Glense, 2006, p. 152), was the third stage. This process is considered both an activity of simplification, or reduction of the data, and of data complication, but “is ultimately about discovering and conceptualizing the data” (Ruona, 2005, p. 241). In the final stage codes, categories, and themes were used to generate meaning. The aim was to “engage in the creative and intellectual work of exploring how the themes that have emerged are connected to each other” (Ruona, 2005, p. 245), the researcher’s ideas, the literature, and prior research.

Interviews

Interview data was analyzed using the constant comparative method and coding scheme using word processing software. The four-stage model, referenced above, began with data preparation, then continued with familiarization of the data, coding, and the generation of meaning.

Step one: data preparation.

Recorded interview data was professionally transcribed. A code number was assigned to each participant, and a separate master list matching the code numbers with the files was kept to link each individual’s actual identity to the transcripts. Each interview transcription was checked for accuracy by matching the recording with the transcription. Each transcribed interview was saved as a separate document, and a copy file was created with a different file name for analysis. This file was then converted to a table with six columns with a header row containing the names of each column: Code, ID, Q#, Turn #, Data, and Notes. (See Figure 1). This process of formatting data into tables allowed for data to be organized, segmented into “meaningful chunks,” merged across participants, and sorted in a variety of ways (Ruona, 2005).

Code	ID	Q #	Turn #	Data	Notes

Figure 1 Sample Table for Data Analysis

Step two: familiarization.

This stage involved delving into the data at a deeper level. The purpose in this stage was to engage actively with the data, begin analysis, and record the insights that became visible through the process (Ruona, 2005). There was one table per interview in order to preliminarily partition meaningful segments of data (Ruona, 2005); this allowed insights to be captured. An ID number was typed in each row, so that the particular participant could be identified as the speaker. Rows containing my words as the researcher had my initials followed by the ID number for the participant. A Q # was recorded to correspond with the question asked to elicit that participant's response. Analyzing the data was the next step, looking for meaning segments. Segments were placed in newly created rows keeping ID and Q #'s filled in accordingly. Insights and notes were recorded in the notes column throughout the process.

Step three: coding.

This process further segmented the data into categories or themes and identified the themes with code numbers. A number system was established for use with the coding allowing for both categories and subcategories. I approached the coding process inductively. All interviews were coded prior to beginning stage four of the process.

Step four: generating meaning.

The final stage in the process merged the coded data for "group-level analysis" (Ruona, 2005, p. 257). In this stage the data from the multiple interviews was merged

together for comparison across the interviews. Data was sorted, for analysis, thematically according to the coding system. By sorting the data using the features of the word processing program I reflected on the themes that were emerging across the participants and engaged more fully in the process of interpreting and generating meaning. Segments within the coded, merged, and sorted data were highlighted for richness and example of the themes. See Figure 2. In this final stage of generating meaning I engaged in interpretation and exploration of how emergent themes connected with one another, my own ideas, the literature, and prior research (Ruona, 2005).

Code	ID	Q #	Turn #	Data	Notes
15000	MS01	23	79	And if churches don't play a role in the nurturing and care of young ministers, most of them won't survive. So this is our, this, you could even use your holy imagination. So this may be a gift to your sons and daughters or, you know, the students from your church as they go, you know, to Atlanta and Knoxville and, you know, all these places. Will it affect your church? Yes, it will. It will. But I think that's a byproduct of the investment that you make.	Also a good statement on the reason to engage in this kind of program.
15000	LCC01	11	39	But I think it's so unfortunate that those two young men went out there and just full of it and loved by their church, and they were wanting them so badly, and then because of one little kind of misstep or perhaps one ill-advised kind of thing that idyllic situation just went away, and as I say it's cost one of them and cost us a very good Pastor.	
15000	PC01	14	67	You know, this one is, each career is very different. But there is some uniqueness to this ministry, you know, a minister career as far as because, and I can still see that in working with George at times and seeing that the burden that this whole church, which is the people, not the building, is on his shoulders. And how	

Code	ID	Q #	Turn #	Data	Notes
				do you prepare, you know, a 25 year old to be ready to go out and do that?	
15000	CL02	16	58	Anyway what I learned about the ministry is like I said it's a whole new appreciation for people who dedicate their lives to doing that and yourself and really stick to it and knowing that those people could go in a lot of different directions, you know their capabilities are there to take them in any direction they want to go. And see them apply themselves to that and stick to it is, it makes you want to get behind them in some ways, it's not anything that I could ever do but I can support them in other ways you know I've learned to work together.	Also speaks about the appreciation of this work and the people who do it, and that it generates in him the desire to be supportive.

Figure 2 Sample of Sorted and Highlighted Data

Documents

Comparison of official statements found in various public documents such as brochures, committee meetings, and reports, with what the researcher hears and observes makes for an “intriguing form of analysis” (Patton, 2002, p. 293). Basic established rules in appraising and analyzing documents “are generally discussed in terms of authenticity, reliability, meaning and theorisation” (McCulloch, 2004, p. 42). The preliminary stage in analysis of documents is establishing the authenticity of them, including verification of the author, date, and place of writing. Authenticity of documents pertaining to church policies was verified according to their adoption and approval by groups and members of the congregation. Newsletters, brochures, and other public documents were verified based on circulation and distribution as church materials and identification of dates and contexts of these materials. Reports were considered as verifiable as result of being

submitted to other committees, boards, and/or organizations. References to reports, correspondence, and memos in church publications or committee minutes served to verify documents as authentic.

The second issue regards document reliability, “that is how far its account can be relied on” (McCulloch, 2004, p. 42). The researcher takes into account the author’s position, presence, and experience as means for giving a faithful accounting. A presence of bias is to be considered as well. Certainly if ignored there would be few sources of documentary evidence available, “but also because an understanding of the biases involved gives the researcher a significant clue to the issues being studied” (p.43). The differential survival rate of documents is of concern with reliability as well. Though this too may reflect another form of bias, “documents that do survive in some quantity are probably strongest in presenting official viewpoints and those that have ultimately been successful,” rather than those that do not remain (p. 43). A primary strategy here is to make use of a wide range of documents that potentially leads to a representation of a wider range of viewpoints and interests. This, according to McCulloch (2004), appears to be a form of triangulation. I employed a strategy here of collecting multiple documents of types and sources that have been stored and preserved.

Third and fourth issues in document analysis concern the meaning of the document and theorisation. Attention to meaning involves clarity and the completeness and comprehensibility of the document, as well as attention to the context in which the document was produced. McCulloch (2004) reports that recent emphasis has focused on the textual nature of documents, especially in its language form, for determining deeper meaning, using principles of hermeneutics. Cohen (1999), claiming that historians tend to

read texts “mining them for factual information” about times and places, says such treatment is a failure to grapple with language and does not “engage texts as ‘texts’” (p. 65). He then suggests understanding documents should be in terms of the “semiotics of text production, how meaning is made in text, how readers take meaning from text, the status of authorial intention versus the reader’s interpretation, the role of the community of discourse in the reception of text” (Cohen, 1999, p. 65-6). Cohen also argues that “there is no single correct approach to reading a historical text; there are only ways of reading” (p. 81).

These considerations begin to intrude on the fourth issue of document analysis, theorisation which “entails developing a theoretical framework through which to interpret the document” (McCulloch, 2004, p. 46). McCulloch (2004) discusses examples of three theoretical approaches, positivist, interpretive, and critical. He states that “these different aspects of analyzing documents should not be conceived as wholly separate or distinct” (p. 47), and contends that they overlap and interact with each other in practice. “Moreover, it is important for us to understand documentary-based research as being, like other forms of educational and social research, not a linear model but a social process” (p. 47).

Whereas the primary research data was that contained in the interviews, documentary material served as a secondary resource. Documents collected for this study were reviewed for new material and verification of information shared in and through the interviews. Most significant of the documents were the annual reports generated and supplied to the grantor. These, being required, were therefore available for each year of

the residency providing confirmatory evidence of the progressive development of the residency program and its impact upon the participants.

Validity and Reliability

Validity and reliability in qualitative research are approached “through careful attention to a study’s conceptualization and the way in which the data are collected, analyzed, and interpreted,” and the presentation of the findings (Merriam, 2009, p. 210). Qualitative research places the researcher in direct contact through questioning and observation with individuals who have a construct of reality. As an interpreter of reality, the researcher has responsibility to ensure that the description of this reality is as accurate as is possible (Merriam & Simpson, 2000). However, the search does not yield a “single, fixed, objective phenomenon” (Merriam, 2009, p. 213). Because of the relationship of the researcher as interpreter with the subjects and the findings, measures are to be taken to strengthen the validity and credibility of the study.

Internal Validity

Internal validity is concerned with the credibility of the findings focusing on congruency of research findings and how well they match with reality (Merriam, 2009). Four strategies for strengthening the validity of this study will be used. Member checks, data triangulation, peer examination, and accounting for researcher bias. One strategy to strengthen validity will be member checks. Accuracy in the reporting of the accounts of interviewees is important (Huberman & Miles, 2002). The process takes the tentative interpretations of data by the researcher back to the individuals from which it was derived and asks for their comments and suggestions as to how the interpretations might better reflect their experience (Merriam & Simpson, 2000), and to review the material for

“accuracy and palatability” (Stake, 1995, p. 115). Member checks not only increase validity but also add “to the overall comprehensiveness of the case study” (Hays, 2004, p. 234).

A summary of the case and development of the program and participants was prepared. This was sent to the primary leaders of the residency program for verification and any corrections. Their responses served to provide both confirmation of the reporting and clarifications and corrections on some of the details.

Secondly, data triangulation is “a means of checking the integrity of inferences one draws” (p. 298), using multiple data sources to examine conclusions from more than one vantage point (Schwandt, 2007). Though results in the data will vary, triangulation provides testing for consistency in the findings (Patton, 2002). A triangulation of data from the two sources of interviews and documents was employed to compare and cross-check for the consistency of information (Patton, 2002).

Peer examination is the third strategy for building trustworthiness in this study (Merriam, 2009). The dissertation committee comprised of my major professor, methodologist, and faculty members served as a review of peers in this study. Both my major professor and methodologist gave close review throughout the research, analysis and interpretation phases of the study. This process of review by the entire committee provided verification of findings by those “knowledgeable about the topic and methodology” (p. 220).

Awareness of research bias is important in order to strengthen the integrity of the study. (Merriam, 2009). This is particularly important since the “researcher is the primary instrument of data collection and analysis” (Merriam, 2009, p. 52). This process of

“critical self-reflection on one’s biases” is known as reflexivity (Schwandt, 2007). A subjectivity statement on researcher bias and assumptions is provided in Appendix B. Reference and reflection to this throughout the course of this study, including data collection and analysis, will serve to strengthen its internal validity.

External Validity

External validity draws attention to “the extent to which the findings of one study can be applied to other situations” (Merriam, 2009, p. 223). This is determined in large part by the thorough nature of the design of the study, richly detailed reporting of the data for the reader, and the readers’ use and application of these findings (Schwandt, 2007; Stake, 1995; Merriam, 2009). Though a single case study is not a strong base for generalizing to a broader application, “people can learn much that is general from single cases” (Stake, 1995, p. 85). The selection of a single case for this study is done in order to “understand the particular in depth” (Merriam, 2009, p. 224), and in qualitative research, the goal is to understand not to generalize (Ruona, 2005). Through learning from a particular situation, others “can transfer or generalize to similar situations subsequently encountered” (Merriam, 2009, p. 225). In order to maximize the readers’ use of this study rich thick descriptions of the setting, participants, and findings have been provided. Inclusion of quotes from interviews has also been provided (Merriam, 2009). The nature of this particular case, the congregation’s longevity in conducting the residency program, and the quantity of residents who have completed the program may prove to draw the interest of others in congregations and supporting institutions seeking to learn from the experiences of this particular congregation. Ultimately, the reader plays a major role in

the determination of how applicable these findings will be to other situations (Merriam, 2009; Schwandt, 2007; Stake, 1995).

Reliability

The traditional sense of reliability for a research study involves benchmarks and standards whereby the study can be replicated (Merriam, 2009). Qualitative research is conducted in order to search for meaning and understanding of the world or environment of the participants as they themselves experience it (Merriam, 2009). Replicating the findings from this study to another like it is problematic “simply because human behavior is never static, nor is what many experience necessarily more reliable than what one person experiences” (p. 221). Qualitative studies will not yield the same results when replicated, however, “this does not discredit the results of any particular study” (p. 221). What is important is that the results are consistent with the data collected, and that an outside reader will concur that the results are “consistent and dependable” with the data collected (p. 221).

The audit trail, or research log, is a detailed description of “how data were collected, how categories were derived, and how decisions were made throughout the inquiry” (Merriam, 2009, p. 223). This type of fieldwork verification and confirmability of the data collected was done in order “to minimize bias, maximize accuracy, and report impartially” (Patton, 2002, p. 93). A researcher journal has been kept as this study was conducted. The journal includes my reflections, questions, and decisions regarding the collection, analysis and interpretation of the data.

Data Reporting

Case study reports do not follow any stereotypical or standard format (Merriam, 2009; Yin, 2009). The researcher is afforded options and choices, in part with reliance on personal instincts and abilities throughout much of the research effort, for reporting (Merriam, 2009). These reports can be in a written form or delivered in an oral presentation, (Yin, 2009) and “organized any way that contributes to the reader’s understanding of the case” (Stake, 1995, p. 122). The contents of reports depend on the audience and the purpose of conducting the research (Merriam, 2009). There are various approaches and ways of organizing case study reports.

Merriam (2009) identifies two common patterns in organizing case study reports. One is to present a descriptive narrative, then follow with presentation of the analysis and interpretation. The second common approach is “to integrate descriptions and vignettes with commentary” (Merriam, 2009, p. 262). Stake (1995) emphasizes reports may take on a story quality including stories and vignettes, but clarifies the report is not strict storytelling. He identifies three primary approaches in reporting cases, a chronological or biographical development of the case, the researcher’s view of coming to know the case, or one by one description of the major components of the case. Yin (2009) expands his discussion on approaches to include six possible structures for reporting case studies.

Stake (1995) outlines and describes a format for reporting that identifies seven sections to the report. The first, and last section is comprised of a vignette. The first vignette aims for the readers to develop a vicarious experience and get a feel for the setting and environment of the case. The final vignette ends the report in an experiential manner that serves to remind the reader “that the report is just one person’s encounter

with a complex case” (Stake, 1995, p. 123). The other five sections combine to provide a full report that incorporates all elements of qualitative reporting (Merriam, 2009). This framework allows for sections to be drafted then shaped into a narrative that makes the case comprehensible and interesting.

Foremost in preparing a case study report is consideration and determination of the audience that will receive the report. This is particularly important with case studies because they “can have a more diverse set of potential audiences than other types of research” (Yin, 2009, p. 167). The primary audience for this case study is congregational leaders, both clergy and laity. A secondary audience is individuals who work with congregations in the area of placement, reference, and referrals. These individuals may serve in seminary or divinity schools, or work for denominational bodies that serve to support and supply congregations with clergy leadership.

I used Stake’s (1995) framework for developing a narrative case report aimed at congregational leaders as the audience, particularly ones considering the opportunity to engage in the inductive phase of clergy education as a teaching congregation; and, for individuals who work with congregations in the area of placement and referrals. Whereas a presentation could be made to the congregation as a whole, it is likely that a smaller group, or governing board, comprised of church leaders and one or more staff would read a report on another congregation’s experience. Stake’s framework, including the vignettes, provided the means for including the purpose and method of study, narrative description to define further the case and contexts, descriptive detail, and understandings. A case study narrative report is presented as Chapter 4. Chapter 5 follows dedicated to

findings from the research. Chapter 6 includes summary, conclusions, and implications concluding the study.

CHAPTER 4

CASE STUDY REPORT

The purpose of this study is to explore how teaching congregations learn in the process of facilitating the training and development of beginning clergy in the inductive phase of clergy education. The research for this study focused on a teaching congregation representing an exemplary case engaged in this inductive phase. The primary means of data collection occurred through individual interviews with staff members, church members, and pastoral residents. This chapter presents the case studied and includes how the church initially became involved in this type of clergy development and a description of the congregation. Following the congregation description is information about the program, *Pathways to Ministry*, and how it functions in the church. Brief biographical descriptions of the individuals interviewed give an overview of the five staff members, five laity, and 2 residents. The chapter concludes with an overview of how the congregation is engaged as a teaching congregation and provides an outline of the grant funding.

The Beginning of the Story

The *Pathways to Ministry* residency program began at Wilshire Baptist Church in 2002 not as a concrete program with a strategic plan. Instead, a convergence of precipitating factors occurred. Personal vocational questions, an ongoing formative relationship between a pastoral mentor and minister, circumstances of challenge and change in the environment of professional ministerial training, and a presenting

opportunity combined in the emergence of an exemplary model for inductive clergy education in a local congregation.

The personal vocational questions emerged from a senior pastor who believed he had reinvented himself once already. Now entering his second decade of pastoral ministry in his congregation, he sensed a desire for a new kind of engagement vocationally. He affirmed his love for the church and his love of the pastorate. However, he says he honestly didn't think he "wanted to just hop around for career purposes." He was in his mid-forties and recognized that he could conceivably be in his present congregation another 20-25 years. He says, "Well you can't just keep doing the same thing over, and over, and over again it seems to me, and find that stimulating. I wanted to grow in my own vocational path. . . . So, therefore, what am I going to do exactly to continue now?" Some individuals will move to different congregations in order to remain fresh, others do so by writing books, speaking, or consulting. Having acknowledged these as viable possibilities for some, he admitted,

"For whatever reason it seemed like I stopped turning towards my own career path, you might say, and started looking back to the generation that was coming after me instead. And it occurred to me there really is a more important legacy than my own per se – as in how anything I might to have to offer could live through many other ministers coming after me – than simply the single contribution I made to a congregation in my time."

This began to dawn on him and grow within as he had conversations with young people in the church with a growing curiosity in the work of ministry and saw them begin going off to seminary. At this same time, the Pastor Emeritus, Bruce McIver was about

to publish his final book, *Riding the Wind of God*. The book was about his experience with the youth revival movement during the late 1940s and through the 1950s, a movement that inspired large numbers of college students with interest in faith and the church in ways that nurtured many into ministry. The senior pastor commented, “Kenneth Scott Latourette, the great church historian from Yale supposed that single youth revival movement across the south led to over 3,000 people being called into the ministry.” George, the Senior Pastor and Bruce, the Pastor Emeritus were having a conversation about all of this in Bruce’s hospital room during October of 2001. George asked Bruce, “Do you think that could happen again?” And Bruce said, “Well of course it could happen but it would be certainly of a different kind because revivals and that sort of thing. I don’t know what the ingredients would be in all that.”

The senior pastor’s personal questions and professional awareness converged with the meaningful pastoral relationship he had with the pastor emeritus. This senior pastor was the immediate successor to this pastor emeritus who had served at Wilshire Baptist Church for thirty years. These two had formed a strong and meaning relationship over the years. A church member who had enjoyed the leadership of the pastor emeritus during his tenure as pastor described the relationship between these two in these words. “It was obvious to everyone that knew them that there was a magical relationship between them.” She described the mentoring that went on between them being, “a learning opportunity for George.” During that hospital stay in October of 2001 as Bruce McIver’s health was declining, this church member had come by to visit when the senior pastor was there visiting. She commented to the two of them, “I just wish you all could have taught this in seminary some place. Because it doesn’t always happen.” She reported, “Bruce very

clearly said, ‘that cannot be taught’,” implying that it is not something which can be learned in a classroom.

During these hospital conversations between George Mason and Bruce McIver about nurturing and growing future generations of ministers George said to him, “Well you know we have a number of young people going to seminary these days from our church and I keep thinking that our church ought to be at the center of that somehow, that your influence and my interest have come together.” He then asked him, “What would it be like do you think if were to have some young minister always on staff turning over, training a young minister all the time?” Their conversation continued and Bruce told, with a growing excitement, of how Wilshire had a tradition of internships through the years. And he looked to his wife Lawanna and said, “When I die why don’t we ask for all the memorial money to go start that program?”

Bruce had been very ill and died two months later just before Christmas. His wishes were honored and the church received \$150,000. In May of 2002 the church began the program with its first pastoral resident. The church was provided an opportunity to take action on a dream through a combination of the visionary benevolence of one of its long-time pastoral leaders and the hope-filled desire of the current pastor. Near this same time the senior pastor read in Alban Institute’s *Congregations* magazine that this whole idea was already being fostered by a few churches with support from the Lilly Endowment. The article was focused on Second Presbyterian Church in Indianapolis, which Mason described as “sort of the godfather of the residency program.” Mason made a trip to talk with the pastor of the church, Bill Enright, and told him what Wilshire was already undertaking and he thought it was great.

Enright encouraged Mason and suggested he write a letter of request to be considered for a grant from a new transition into ministry program being established in the religion division of the Lilly Endowment.

A formative and nurturing relationship provided for a foundation for shared dreams and visions. The shared conversations about the challenging horizon of pastoral leadership, past experiences, and the internship practices of a local church were like tributaries joining to form a larger stream. Possibilities emerged and combined with generosity to initiate an experiment in pastoral residency. As this commitment was launched in the congregation a certainty of where the flow would carry them did not yet exist. An additional source of support, the initiatives and grant opportunities from the Lilly Endowment, soon converged providing the congregation with a three-year grant of \$800,000 to move forward in development of a full program of pastoral residency.

Description of the Church Context

Wilshire Baptist Church is located in East Dallas only a few miles away from Southern Methodist University and downtown. The contexts of the congregation include: urban, regional, community and neighborhood. The total membership of the congregation is approximately 3,100 members, of which 1,800 are resident members. The church offers two Sunday morning services with a weekly worship attendance that averages 1,200. The church employs 10 full-time ministers serving the congregation with numerous support personnel. The annual operating budget is \$3.9 million, with about 20 percent of the budget designated for missions ministries. Wilshire Baptist Church is a founding congregation of the Cooperative Baptist Fellowship, a network of churches and individuals that formed in 1990, and identifies with the Baptist General Convention of

Texas, Central Dallas Ministries, Buckner Benevolences, Baptist World Alliance and numerous other ecumenical and interfaith ministries. (Wilshire Pastoral Residency Brochure, 2010).

Pathways to Ministry

The pastoral residency program of the church is part of a larger program called *Pathways to Ministry*. *Pathways to Ministry* represents a comprehensive approach to the larger goal of the congregation in fostering, developing, nurturing, and sustaining individuals toward ministerial vocation. Three other components comprise *Pathways to Ministry* which are designed to address individuals at different ages and stages on their educational and career path. One of these has been part of the church's history and practice for nearly 2 decades, though funds have not been available every year. The church has a demonstrated commitment to ministry interns, and currently through the *Pathways to Ministry* program provisions for interns is a consistent commitment. Internships are offered in the summer months for those in college. The associate pastor described this as "a learning experience for them because we want them to immerse themselves in ministry and try it on for the summer and see how does it feel to do this. 'Is this something I'd like to do as a career? Might I really be called to this?'"

A second component of *Pathways to Ministry* developed in 2004. Known as *YourCall*, this initiative "introduces high school students to the concept of vocational ministry as a viable option and honorable calling" (2005 Lilly Grant Proposal, p. 6). An initiative that has developed into a "program of vocational discernment that includes readings in theology, church history, biblical interpretation, Christian ethics, and worship, along with peer exchanges and personal mentoring for mature Christian church

members” (2009 Lilly Grant Proposal, p. 6). Thirdly, a church member from Wilshire that attends seminary or divinity school receives a small financial stipend of support from the congregation. The support extends beyond financial. Seeing themselves as a teaching congregation they extend the support to include for each of these students a *Pathways* adopted family, and are remembered in prayer weekly at the church Wednesday prayer services.

The identity and breadth of *Pathways to Ministry* emerged year by year. Early in the process an advisory team for *Pathways* functioned, in the description of the associate pastor, as a “Chamber of Commerce for the residency.” Though they didn’t meet regularly as a standing committee might do, “they provided some advice here and there” acting more as a “sounding board, as needed, and would rally the troops to welcome new residents” (AP01, 23.84). The residency program is deeply rooted in the congregation, so too are all the aspects of *Pathways to Ministry*. What emerged as a residency program with four residents has become so much more. One of the members who has served as a chair of one of the lay mentoring committees shared his perspective on this growth. “We’re involving much more than just four residents. We’ve got young people that are in college and in high school that have expressed an interest in looking into the ministry; and, those programs have been developed. This thing has really spread.” The church has made a deep investment in the development and support of individuals seeking this path of vocational identity and service. The church is also faced with making that investment for the long term financially. Therefore, they have formalized the *Pathways to Ministry* Committee and established this to further their fundraising efforts to increase the

endowment for sustaining their valued commitment as a contributor to the education of clergy and development of ministers for a visionary future.

Development of the Program

The pastoral residency grew over a 3-year period from a beginning of one resident to a full rotating system of four pastoral residents. The program maintains four residents, each one serving for 2 years. Each year, two new residents are admitted to the program, and two leave the program so that the rotation is staggered. The associate pastor's description of this evolvment reflected the change in dynamics among the residents as well as emerging awareness of the presence of these residents and their growing impact upon the staff and the congregation. He described the Shire, the name for the room where the residents have their office and work space, as illustrative of the early impact and evolvment of the program. Here is how he described the beginning as the first resident started:

“ . . . all by himself. The room that you see today is the Shire, where the residents are, it honestly had been a children's Sunday school classroom and we had shuffled stuff down and he was in that huge room all by himself. He had one little desk in the corner and the rest of the room was empty. He often kept the lights off and sat there by the window. It was such a vastly different picture than what you see when you walk in that room today, so that our notion of a resident, in those days, was shaped by here's this one little guy in the corner over here and what's he doing. Then that changed immediately with the next cycle [when the second and third residents entered the program]. . . . All of a sudden you have three people here, and just the quantity and the change in that room . . . what we

had to do spatially with the room, changed the dynamic of it. . . . There was a third iteration of awareness that happened . . . The third big change happened once we were fully on board with four residents and the cycle was established and we began to have to deal with these issues of allocating preaching time, exactly what is it that residents are supposed to be doing, what's the job description which lead ultimately to, I think, the fourth big change when we, somewhere around 2005, 2006 began to say, 'OK, we've got to formalize this even more with expectations and scheduling.'"

He summarized these periods by saying in those initial 2 to 3 years:

"The first 2 to 3 years, the residents had a lot of free time, and it's not that they were goofing off, but the residency was much less structured than it is today. It took a period of 2002, 2003, 2004 and into part of 2005 for us to get to the point of saying, 'OK, we've got to have more of a routine to this and a more regimented schedule.'"

The laity involvement and support, while committed, was not highly structured either. The *Pathways to Ministry* Administrator described that in the beginning there was not very much structure for the lay mentoring committee. She reported that when the team started the chair received very simple instructions from the senior pastor, "just nurture and be there and give the view from the pew." She continued, "So we really didn't have anything, there was nothing written, there wasn't anything to tell us what to do." One of the lay mentoring committee chairs echoed the lack of formal structure saying, "We frankly were kind of flying blind for a while you know, we said 'OK we're a lay mentoring team now what are we supposed to do?'"

Beginning with the 4th and 5th years of the program, 2005 and 2006, these presenting questions when combined with staff changes brought about further developments, structure, definition and stability to the program. The associate pastor's predecessor, who had served the church for a long time, and had given guidance with curriculum, was resigning. The staff transition presented the necessary attention of how to coordinate curriculum, and became an opportunity to reconsider how to approach the curriculum. The minister of music took on the duties of leading the pastoral seminars. The other staff change was a new position. The church decided to hire an administrator for the residency program. The program administrator brought helpful structure to the overall program. The associate pastor described these developments in this way:

“But, what had been more of an ambling stream approach suddenly became a defined river. It's like we built concrete banks on both sides of the water and really contained it to say ‘We've got a 2 year period with these folks. Here's exactly what needs to happen during that time.’ Whereas before it was sort of, we were feeling our way. Even the pastoral seminars that happened, the colloquia were much more conversational, much more meandering, much more stream of consciousness because we were all, I think everyone's feeling their way. The program administrator really helped bring definition to the curriculum, if you will, and we're in a different iteration even in that curriculum than we were in 2005 or 2006 because we've continued to tweak it.”

Components of the Program

The pastoral residency comprises a system of exposure, experience and interaction with all levels and aspects of the church's life and ministry. Pastoral residents

serve for 2 years during which they have responsibilities of leadership, opportunities for observation, seminar experiences for exploration and learning, mentoring relationships with the pastor and staff, and support and reflection from lay mentoring committees and faith partners. A primary aim as described in the residency brochure is for the residents to “understand the philosophy as well as the practice of ministry” (Wilshire Pastoral Residency Brochure, 2010). Wilshire is intentional to distinguish the residency from an internship. Residents are considered to be a minister on staff without portfolio. These individuals do not have responsibility for a specific area of the church’s ministry, such as an age group division, or program area like Sunday school or missions. They are described as “ministers, peers, and colleagues,” but they “don’t have a program responsibility” in the church system.”

Naturally, the residency includes opportunities for the residents to have direct interaction through a mentoring relationship with the pastor. Central to the origin of this endeavor by the church is the personal learning relationship that a new and entering clergy can have through contact, conversation, and feedback with a seasoned, experienced pastor. Residents are able to see and learn firsthand how a pastor handles church conflicts and how to work toward a balance of tending to administrative needs and pastoral responsibilities in the congregation. These beginning clergy are afforded the chance to see the human side and personal struggles of serving in the role of pastor, and ask questions about situations and church issues. Residents also receive individual feedback on preaching as each resident will meet with the pastor to review a video of the resident’s preaching in worship. Additionally, residents are afforded other professional consultation through lay professional staff. These professionally trained members of the

church interact with the residents to provide support and learning in areas of family and emotional health, personal financial management, and creative writing.

Residents preach in the morning services, and on occasions at other area congregations. They participate weekly in staff meetings and worship planning, rotate through many of the Adult Sunday school classes to teach, attend meetings of the church's administrative committees, provide leadership with Wednesday Bible studies, and have primary responsibilities for other special services and programs including Sunday Evening Vespers, and the Annual Fall Study. They are encouraged and expected to volunteer with some of the summer programs like Vacation Bible School and participate in mission trip opportunities. As expected these various venues of practice provide the residents with rich learning opportunities. These multiple venues also provide for members of different groups and ages within the congregation to interact with these residents which fosters reciprocity of learning.

The pastoral seminar is designed to teach and expose the residents for what to expect in the work of pastoral ministry and about the life of the pastor. These weekly seminars are coordinated by the minister of music who serves as the pastoral supervisor. The seminars are scheduled from September through May of each year with natural breaks for holidays. Residents are paired with existing staff in a hospital visitation schedule. This is done intentionally for a dual purpose according to the associate pastor. One reason is because "there's value being a resident learning alongside of a minister," and "learning from each other." His second reason for doing this is "purposely getting staff to interact with the residents."

A formal structure of laity involvement, in addition to the staff involvement, engages laity in a variety of ways with each pastoral resident in his or her work and life in the congregation. These formal relationships for each resident include an assigned host family, a faith partner, and a lay mentoring committee. The host family provides ministry of hospitality for the full 2 years the resident is in the program. The family hosts the resident in their homes initially and is encouraged to continue to have periodic shared meals, participate together in community cultural or sporting activities, or any other creative opportunities to exercise encouragement and support. The host family is encouraged, following specific occasions when the resident has led the congregation through preaching or other public ministry roles, to offer feedback and encouragement. The faith partner establishes a relationship of support and encouragement through prayer and regular communication. This relationship operates under a covenant of confidentiality.

Each resident is matched with a lay mentoring committee. Lay mentoring committees are comprised of four to six church members who agree to serve a 2 year term and meet regularly with the resident. The purpose is to provide support, offer feedback to the resident on preaching, teaching and other public practices, though this group is not responsible for evaluating the resident or the program. Conversations with the resident might deal with assisting the resident in navigating the inner workings of the church, covering how staff, committees, and other groups function together. Another important and valuable perspective these church members provide to the resident is the views and perspectives on what church members expect of pastors and staff. The mentoring committee also provides the opportunity for the resident to explore personal

issues, relational conflicts, and the impact of ministry demands on personal time.

Confidentiality among the team with the resident is observed as well so that the environment becomes a safe place for honesty, support, and reflection.

The church works openly and supportively with the residents as they near the end of their residency and as they are in the process of searching for a full-time permanent position. This support and assistance is evident in multiple forms. The residents receive advice and information about how to “do their homework” on congregations that contacted them, and suggestions on how to interview churches and committees with whom they are in contact. Another opportunity of both preparation and learning is the Mock Search Committee experience the residents have. The church will put together a mock team of church members to function as a search committee from another church. Then, this mock team will interview the resident as would a real church search committee aiding the resident to practice interview skills and answer questions about his or her views and goals for ministry in a local congregation.

The People of the Data

As a qualitative study, the data gathering relied heavily upon interviews with staff, church members, and pastoral residents. Among the individuals interviewed five were staff members, four of which were ministry staff, and one administrative staff. Another five individuals were church members. Two served as lay mentoring committee chairs, one was currently serving as the chair of deacons, and one had served previously as a chair of deacons and had served as a lay mentoring committee chair. The fifth individual was a church member with strong interest and understanding of the residency program from its beginning, having been a member of the church well before the

program began. The remaining two individuals were pastoral residents. One was currently in his second year of residency, the other had completed the program 2 years prior and she was currently serving as a church pastor in North Carolina.

The Senior Pastor, George Mason, had served in the congregation for 22 years as pastor. His predecessor, now deceased, had served as pastor for 30 years. The congregation has experienced two long, consistent, and stable leaders in the office of pastor. This may speak well of both the individuals who serve, and the congregation that supports. Both the Associate Pastor and the *Pathways to Ministry* Administrator were members of the congregation prior to becoming a staff member. The Associate Pastor, Mark Wingfield, was a member for 5 years prior to joining the staff in 2004. Previously he had served in the career of denominational journalism for 21 years. At the time of the interviews he had 7 years of service on staff. He was vice-chair of the deacons in 2003 and had been in the conversations and planning as the residency program was beginning.

The *Pathways to Ministry* Administrator, Geri McKenzie, was an academic counselor at SMU prior to joining the staff and as a member of the church had served on the lay mentoring committee for one of the early residents. This administrator position was created in 2005 and she was hired at that time and has served for 6 years as the first and only person in this role. As administrator she does the day to day coordination with the residents and the church at Wilshire, schedules the residents for teaching assignments in Sunday school classes, distributes the scholarship checks to the church members who are in seminary, and coordinates the summer interns that the church hires each year. Additionally she oversees the grant and coordinates the reporting to the Lilly Endowment.

The Minister of Music, Doug Haney, has served for 7 years at Wilshire having joined the staff in 2004. He has held this position in four other congregations prior to his tenure in Dallas. He also serves as the Pastoral Seminar Leader for the residency program coordinating and leading this weekly series of seminars that are scheduled September through May of each year.

The Minister of Business Administration, Paul Johnson, had served as a church business administrator in another congregation for 13 years prior to joining the staff of Wilshire in 2005. He works with the *Pathways to Ministry* administrator with the basic grant information, monitors and turns in the yearly reports for the grant reporting, and works with the residents in their 2nd year focusing on subjects of church stewardship, budgeting, church bylaws, policies and procedures and the importance of these in a congregation. He assists the residents as they become involved with a search committee in researching the churches and negotiating and understanding the financial packages of job offers. He also does follow up after the residency program and maintains contact and a relationship as a resource person for them once they are employed.

One of the lay mentoring committee chairs interviewed, Robert, was a long-time member of the church. He and his wife have been married for just over 50 years. They are parents of adult children having recently experienced the unexpected death of their 42 year-old daughter. He developed a personal relationship with the first pastoral resident, though not directly involved with any of the support teams or systems, and that relationship continues to the present. He was later asked to serve as a lay mentoring committee chair with one of the residents in the third class of residents, which was the 1st year for the congregation to have a full four residents in the program.

The second lay mentoring committee chair interviewed, Larry, had been a member of the congregation for about 6 years at the time of the interview. He had been a member for approximately 3 years, and the church was in its 6th year of the program, when the program administrator approached and asked him to serve as a lay mentoring committee chair. Admittedly, he says that as a relatively new member he was not familiar with the residency program when asked to participate in this role. However, he was confident to serve because of the support and organization provided by the program administrator.

The first church leader interviewed, Alan, was serving at the time as the chair of the deacons. His membership in the church was prior to the start of the residency program having been a member for 21 years. Additional roles of church leadership include service as both a member of and chair of the finance committee. Though not directly involved in the residency program he is both familiar with it and knowledgeable of its purpose.

The second church leader interviewed, Dennis, was an active deacon as the church was beginning the residency program and served as chair of the deacons in 2003, the 2nd year of the program. He also served as a lay mentoring committee chair in the 3rd year of the residency program, the 1st year the church had a full rotation of four residents involved. He has been a member for over 20 years. He and his wife have served as teachers in the church's ministry currently involved with a class of couples in their 30s and early 40s. Prior to teaching couples they taught a 1st grade Sunday school group for approximately 20 years.

The final church member interviewed, Janice, was a long-time member, having joined Wilshire when the pastor emeritus was younger and serving in the role of pastor. She has experience in the field of fundraising, and was working at Baylor Hospital with their foundation at the time the pastor emeritus was in and out of the hospital in his final months. She had been an observer of some of the hospital conversations between the pastor and the pastor emeritus, and hosted at the pastor's request an initial gathering of church members who might have interest in the church becoming involved in some type of apprenticeship program. She has remained engaged, supportive, and an advocate of the residency program.

Two pastoral residents were interviewed in this study. Shelton was currently serving as a resident in the 2nd year of his residency. He was a member of what would be considered the 2009-2011 class. The second resident interviewed, Cindy, the church would identify as an alumni resident. At the time of the interview she was serving as pastor in a congregation in North Carolina, and had been a resident in the 2007-2009 class.

An Engaged Teaching Congregation

As a teaching congregation the church supplies a system of support, feedback, mentoring, encouragement, and teaching for the residents. As a comprehensive system the church members are exposed in multiple ways to the leadership, preaching, teaching, and ministry of these residents. Laity engagement and involvement from the beginning has been a key contributor both to the effectiveness of the residency and church's identity. This served to generate early on what the pastor described as "a culture of becoming a teaching congregation . . . because there was a good bit of ownership right at

the beginning with key people in our church who were really for these young ministers.”

These experiences which place residents in direct contact with members through teaching, the mentoring committees, faith partners, and family hosts also serve to build strong relationships among the members with the residents. Furthermore, church members gain an appreciation for the humanness of ministers and the service and dedication that their full-time staff provides.

Over 170 different members have been directly involved with the formal roles available for service and participation in the mentoring of these residents. The whole congregation is exposed to leadership and interactions with the residents through retreats, preaching in worship, teaching on Wednesdays, and many other services and meetings in the life of the congregation. Children and youth have less direct contact, but are also exposed to the residents in various public settings and times of worship. These younger members have positive and formative experiences as well. The program administrator shared how the residents have impacted her own daughter who “made her profession of faith the day a resident was preaching; and, she was baptized by a resident. Her first communion was a day a resident was leading communion.” The residency builds and relies on the strength of relationship and personal interaction in the teaching and learning process. The laity not only are committed to providing this, they are beneficiaries of their engagement.

As a grant recipient the congregation is required to make annual reports to the Lilly Endowment. While this serves to be an additional reflective learning benefit for the church leadership, it provides a view into how the congregation develops in its understanding and identity as a teaching congregation. After a few years into the

program the primary objective of training young ministers included the “desire to nurture in the pew a sense of Christian vocation generally and extend the call to vocational ministry in particular” (2005 Annual Narrative Report, p. 2). 2 years later a more defined sense of role as a teaching congregation that “takes seriously its role in nurturing the ministry of all its members,” also led to the church adopted strategy that “Wilshire nurture and train a new generation of Baptist ministers in a premier church-based clergy apprenticeship program” (2007 Annual Narrative Report, p. 2). A single year after this adoption the church expressed their efforts stating they “have worked hard to become a teaching congregation that models ongoing learning through mentoring” (2008 Annual narrative Report, p. 2).

Further investment by the church in the formative power of this teaching and learning relationship appears in the resident reunions. During the 4th year of the program they began what has become an annual experience. The church has a reunion of the residents who have completed the program. Former residents, considered alumni of the program, are invited to come back. This provides the residents, former and current, opportunity to build an ongoing network and for the church members to hear from these individuals and their current settings of ministry. The reunions also serve as a celebration of their work as a congregation and foster a sense of purposeful pride and value among the members. Additionally these celebrations solidify further their identity as a teaching congregation; and, the program’s importance for the congregation both in its mission and its ongoing life. These words, freely offered by a long-time church member reflected this dual impact, “This is the best thing this congregation has done . . . having the residency here has revitalized our congregation” (Field Notes).

The impact of the congregation's investment is expressed in various ways by members and staff. Though this residency began with the vision of teaching, developing, and preparing others, as it took on a practice of apprenticeship education for young ministers, the members and staff began to recognize that as teachers they too were learning and receiving benefits. By the 4th year of the program the annual report to the Lilly Endowment reflected this discovery with the statement that "the residency program has energized the shared leadership of laity and staff ministers" (2005 Annual Narrative Report, p. 5). Staff spoke about how the residency is helping to keep the church healthy. Church leaders saw how this continual rotation of new and young residents has served to bring a renewed sense of ministry to the full-time staff, and had positive effects for the church.

From Grants to Sustainability

The residency program initiated through the gifts and commitments of the staff, leadership, and members of the congregation. And, as noted previously, grant funding from the Lilly Endowment made possible an expanded and ongoing process of providing this inductive phase of clergy education through a model of a teaching congregation. The initial grant was awarded to begin in 2003. This was a 3-year grant of \$800,000 of the Transition to Ministry Program of the Lilly Endowment. A second grant from Lilly was made as a renewal grant of \$850,000 making possible the extension of grant funding from 2006 through 2010. Beginning in 2011 a new grant of \$1,924,250 was awarded. This grant was different in two ways. First was the establishment of what was called the Dallas cohort, an addition of four other churches in the Dallas area that would be working together with the program at Wilshire. The cohort portion of the grant extends through

2014 with each of the four churches in the cohort receiving \$250,000. An extended cohort church received \$135,000. This provides for Wilshire to be in a mentoring role as teaching congregation for other congregations, and for the pastoral residents of all these churches to have shared experiences in peer learning and preaching practicums. The second distinction is with the funding for Wilshire's program. Wilshire's portion of the grant, \$789,000, extends funding through 2015. It is set up to move Wilshire toward sustainability. Lilly is funding the residency at a 75% amount with Wilshire putting in 25%.

Anticipating the time when grant funding would change and ultimately phase out, Wilshire began planning early in the program for long term funding. As early as 2004 signs of planning for the church to set up an endowment were emerging. The deacons of the church approved a plan for the campaign in 2005 and the congregation voted for approval in early 2006. By January of 2007 the endowment campaign officially began. The church's endowment efforts included funding for facilities as well as the *Pathways to Ministry* program. At the close of 2010, the endowment efforts for *Pathways to Ministry* needs had pledges of more than \$2.1 million, with \$1.85 million given toward that pledge. The fund's market value at that time was reported at \$2.37 million.

A Final Reflection

Wilshire enters the 2nd decade of offering pastoral residency through *Pathways to Ministry*. Since the time of the collection of data for this study a few changes have occurred. The Pastoral Seminar, a weekly seminar which was coordinated by the minister of music has moved to a once-a-month all day seminar with featured guests on particular topics. Secondly, the host family component is no longer a separate entity. This has been

folded into the lay mentoring committee. Thirdly, in April of 2012 the church had a reduction in staff. Following this residents have taken on some program responsibility in the area of Young Adult ministry-education and fellowship. Though a new development it provides the residents with additional leadership responsibility and experience.

Educating clergy in this inductive phase through a model of apprenticeship and transition has become an integral part of the church's identity and ministry. People value this as important for the future of providing and growing ministers for churches, and they have come to recognize that it is life-giving and formative for them as a congregation. This has become not only a natural part of what the church does, but what it means to be and continue as a church.

“ . . .it's just what you're supposed to do. I mean, especially in a church. We're here to help grow each other and there are things that these young clergy are not getting in seminary and divinity school. They have some space to continue to learn and shape themselves as a clergy while being able to know that there's time to reflect on it and develop it and know that, 'If I don't do it right I'm not going to be put out to pasture.'”

One of the lay mentoring committee members shared a similar view, “It's felt very much like something we ought to be doing.”

Beginning as what was described by the associate pastor as “an ambling stream approach” that soon “became a defined river” the residency program has become a major waterway. Rivers and streams evoke fresh water, flowing water, and provide a buoyant possibility for those seeking to move, travel, and make journey to new destinations. Pastoral residency at Wilshire Baptist Church has broadened from convergent streams

into a river which has become a life-giving and life-sustaining resource for those along its banks, and a means of journey for those seeking to move toward new destinations of ministry.

CHAPTER 5

FINDINGS

The purpose of this study is to explore how teaching congregations learn in the process of facilitating the training and development of beginning clergy in the inductive phase of clergy education. Four primary research questions guiding this study are as follows: (1) What is the learning that the congregation does in the process? (2) How does the congregation learn? (3) What factors facilitate or impede the learning of the congregation? (4) What changes in structure, roles, and organization, if any, occur? This chapter presents findings from interviews of staff, members, and pastoral residents involved in a program of inductive clergy education known as the *Pathways to Ministry* pastoral residency program of Wilshire Baptist Church in Dallas, Texas. The findings are organized within these four areas of research: what is learned, how this learning occurs, what factors facilitate the learning, and the changes that occur within the organization. Table 2 provides an overview of the categories and subcategories of the findings for each of the four research questions.

Table 4
Table of Findings

Research Question	Finding from Data	Sub-Category of Findings
What Do Congregations Learn?	Personal Learning	<ul style="list-style-type: none">• Reframing of Gender Issues in Ministry• Appreciation of Generational Differences• Evaluation and Change of One's Work

Research Question	Finding from Data	Sub-Category of Findings
	Ministry as Collaborative Engagement	<ul style="list-style-type: none"> • Collaborative Partnership among Staff • Laity Engage Ministry Identity
	Pastoral Ministry Realities	<ul style="list-style-type: none"> • Ministers are Human, Too • Realities and Challenges of Pastoral Ministry
	Value of Teaching Role	<ul style="list-style-type: none"> • A Significant Opportunity • Contribution to the Future • Mutually Beneficial
How Do These Learnings Occur?	Reflection on Personal Practice	<ul style="list-style-type: none"> • Mentoring Role Generates Reflection • Residency Promotes Reflection
	Effective Modeling by Key Leader	<ul style="list-style-type: none"> • Influential Visioning • Engaged Leadership
	Single and Double Loop Learning	<ul style="list-style-type: none"> • Single Loop • Double Loop
What Factors Facilitate or Impede this Learning?	Involvement of the Laity	<ul style="list-style-type: none"> • Intentional Inclusion • Contributors through Skills and Resources
	Allowing People to Lead	<ul style="list-style-type: none"> • Creates Atmosphere for Learning • Increased Opportunities for Learning
	Contextual Jolts	<ul style="list-style-type: none"> • Conflicts of Alumni Residents • Episode of an Early Exit • Existing Staff Face Adjustments

Research Question	Finding from Data	Sub-Category of Findings
	Infusion of the New	<ul style="list-style-type: none"> • Expectant of New Residents Entering • Keeps Members, Staff, and Congregation Alive Not Stagnant • Opportunities for Learning and Discovery Applied to Whole Congregation
What are the Changes that Occur in the Organization?	Development of New Identity	<ul style="list-style-type: none"> • Identity Emerges out of Vision • Language an Initial Indicator • Functional Ownership through Behavior • A Lasting Identity
	Essential Signs of Change	<ul style="list-style-type: none"> • Behavioral Changes • View of Ministry Broadens • Changes are Beneficial

What Do Congregations Learn?

Interviewees were asked three primary questions to probe the area of learning within the congregation. The questions were simple and similar. The three questions are as follows: (1) What has this experience in teaching and training young clergy taught you? (2) What has this experience taught you about ministry? (3) What has this experience taught your church? Responses from interviewees reveal a variety of personal learnings through their involvement in the *Pathways to Ministry* program. They gained an appreciation for ministry as a collaborative engagement, both between clergy on staff, and clergy with laity. The findings also include discovery and affirmation of the humanity of ministers and the challenges of pastoral ministry work in congregations. Finally there is a deep value in the role for the congregation being a teaching church.

Table 5
What Do Congregations Learn Findings

Research Question	Finding from Data	Sub-Category of Findings
What Do Congregations Learn?	Personal Learning	<ul style="list-style-type: none"> • Reframing of Gender Issues in Ministry • Appreciation of Generational Differences • Evaluation and Change of One's Work
	Ministry as Collaborative Engagement	<ul style="list-style-type: none"> • Collaborative Partnership among Staff • Laity Engage Ministry Identity
	Pastoral Ministry Realities	<ul style="list-style-type: none"> • Ministers are Human, Too • Realities and Challenges of Pastoral Ministry
	Value of Teaching Role	<ul style="list-style-type: none"> • A Significant Opportunity • Contribution to the Future • Mutually Beneficial

Personal Learning

Those who have direct involvement with the pastoral residents in this program spoke about the effect this has on them personally, representing a change in their perspective, or in behavior. Laity experienced a reframing of their views about women in ministry. Laity and staff grew to appreciate generational differences. Staff indicated that the experience of working with younger adults, and being faced with teaching what one actually does, served to revitalize and generate improvement in one's work and ministry.

Reframing of Gender Issues in Ministry

Robert, a church leader, initially had questions about the number of women being admitted to the program because the women were having a more difficult time in finding placement. He also noted that they might be leaving the ministry because of getting married. As a result of his involvement he drew this conclusion, “But I’ve changed my mind. That’s something I’ve learned, that if the candidate is really good it doesn’t make any difference whether they’re a man or a woman they’ll do well; they’ll do well.”

Related to the impact on views related to gender, the program administrator, mother of a young daughter, made the connection that not only was the job and her role beneficial to her, but to her daughter as well. “I will say that early on in this, it probably sounds weird but early on in this I really felt that part of my role in doing this and being in this job was not only for me, but for my daughter.”

The presence of female residents for the congregation enables them to face unexamined views, comments, and attitudes. A patronizing comment had been made to one of the female residents and the pastor called this to their attention. Larry, a lay committee chair, tells it in this manner:

“Our pastor, George, made a comment about feedback being given back to a particular female resident. . . And he reprimanded us for the comment. It was something like, ‘don’t you look pretty today?’ It was sort of denigrating, a little bit underwhelming, actually. And I guess that was an example of our learning to be more sensitive to more people who are not exactly like us.”

Changes in perspectives included rethinking views on gender issues in ministry and appreciation and respect for generational differences. “I learned that first of all there

are very, very talented young men and women that are coming into the pastorate and they need all the help they can get.” Robert also recognized that finding a job in ministry is not easy for women. “One of the things we’ve also learned . . . from being a part of the program . . . is how difficult it is for them often times to find a position with a church.”

Appreciation of Generational Differences

The appreciation of differences along gender lines broadens to other areas as well. Larry recognized that though age is important for moving through life, and aiding us in going from stage to stage in our lives, he discovered a “tremendous amount of common ground even though we’re a couple of generations apart.” And, the experience “has perhaps stretched me a little bit.” He added further that through a shared experience with one of the residents, he made the following discovery: “We learned to be more accepting and a little bit more grace-filled in regard to people who saw things more differently than we did. I don’t know if Matt [the pastoral resident] would say he grew out of the experience, but I know that I did.”

Doug, the Minister of Music stated that he has had cautions and questions about some of the sociological approaches to church that are based on generational differences. This experience with residents, of a younger generation, however gave rise to him rethinking that stance.

“And being in a relationship to them has, I think, probably softened my dismissiveness. Maybe the truth is there really are some differences in the way that we view the world, life and, of course, ministry. And maybe it’s OK to step back from time to time and ask, well, maybe it’s OK to sort of make my peace with that.”

Doug saw value in the generational struggles that occur within the church, and came to value the opportunity to see ministry through the eyes of younger individuals. This gave him a sense that even though the church may look different in the years to come, it will be sustained.

“It's really interesting to see the world of life and ministry through the eyes of a 28-year-old. I don't think I would have ever guessed how intriguing that could be. And then, with growing confidence, to say church may look a little different in the future, but it's going to be OK.”

Though speaking about his initial concern for the type and number of personnel for the future of ministry, Larry's comment revealed a deepening in the appreciation of those younger and from a different generation. “One of the concerns, maybe for my generation, is that the next generation coming along is not going to see the same sorts of leadership models or perhaps even see the same needs being a part of an organized community of faith like Wilshire. And so, to run into people who are prepared to lead and who come from that generation has been a very encouraging experience for me.”

Evaluation and Change of One's Work

Among the personal learnings are that staff people become better at what they do, and gain more insight into their own work through the teaching of others. Having to teach others what ones does, and to do so with a younger generation has an impact on the staff. The staff spoke about how this changed their approaches, heightened their awareness about how adults learn, and gave them cause to evaluate their own knowledge, philosophy and approach, as well as their confidence. In essence, it made them better at what they do, more energized and confident. “So one of the things that I've learned is

sometimes their resistance to learning is not about the content of the learning, but perhaps the means of delivery. Well, I've had to make some adjustments in that.” Doug is 52 years of age and is working with 25 year olds. He continued by saying,

“But I have a hunch that people of my generation and maybe a bit older were much more willing to deal with the old lecture, one-way kind of delivery of the goods, especially if the person is a good communicator. And I'm just not so sure, based on my experiences over six years with mostly 20-somethings, my sense is they want a different kind of teaching style, or at least a more varied teaching style. And one of the ways I've gotten at that, I hope I've begun to illustrate this, I'm not the only voice at the table.”

It caused Doug to consider his approaches with the adults with whom he works, and intrigued him with wanting to know more of why and how adults learn. Though he and his role was not one that usually incorporates the feedback of others and makes changes based on that, he was intrigued with the whole concept and question of how adults learn. This generated a whole series of questions for him of how he can apply life-long learning to the members of his sanctuary choir, and build the confidence and competencies in them that he sees happening in the residents through their experiences. “I think in working with the residents it made me aware of the whole question, how is it that adults continue to learn, because these are bright people. They want to learn.” He continued by saying he thinks of himself as a lifelong learner and assumes “that other people are, but maybe they're not lifelong learners in the same way that I am. And if that's true, then how is it that different adults learn? How do they continue to learn?”

George, a seasoned and successful pastor, made a very personal discovery through the process of teaching others what he does and why. “Well it has taught me that I know more about what I do than I knew I knew.” This led him to the conclusion that:

“So having residents learn these practices of ministry requires that I be able to articulate why I do what I do, how I do what I do, why I don’t do some things and do things in this way. So I’ve become a much more self-conscious pastor, in terms of practice.”

Paul, another ministry staff, expressed he has become better organized, as well as seeing the need to remain sharp and focused.

“I think it’s given me some insights into my own sense of ministry. It’s certainly forced me to be more studied about the information I have. I’m old and gray and I’ve done this for a long time. I’ve never taught anybody else this stuff so when I had to sit down and figure out how to teach people how to do stewardship versus just my eclectic knowledge, I think it’s helped me kind of organize myself into ways that I’ve evolved.”

He also said of the teaching experience he has with the residents: “I think what it does is it makes me keep current with what we’re doing.”

These personal discoveries by the staff were evident in the eyes of the laity. Alan, a church leader comments: “I think it keeps them young, I think they see new perspectives, generational shifts.” Dennis, another church leader, spoke specifically about the pastor, and what he observed about the pastor because of this process. Even though the program is taxing on him,

“I think it’s been rejuvenating in other ways for him, you know, to take some of the things that he has learned and be a mentor and to have just that group of colleagues who are young and bright and inquisitive and want to talk about all the difficult subjects; and have an incredible perspective on it too, you know new ways to think about it.”

Ministry as a Collaborative Engagement

The presence of pastoral residents caused for a shifting in work relationships. Staff reported that the shift resulted in a collaborative environment in their working relationships. Laity observed this changing dynamic. Through these observations and their own experiences with the residents they began to engage in the work of ministry.

Collaborative Partnership among Staff

The pastor observed the value of ministry as collaborative, and this experience of being a teaching congregation led him to have a change in his whole view of his role with the staff.

“I think it’s taught me that ministry is a team sport. And I grew up thinking that it was more about the key figure of the leader of the band, so to speak. Everybody else was supposed to play to my tune and that sort of thing. And that’s probably overstating it a bit. I’m sure that theologically I got that it wasn’t that; but now in terms of practice, I really get it. This is a, it’s a community of practice.”

He said of pastoral leadership that it was more than simply taking the lead in every instance.

“Leadership is really about the work we do together. As a pastor I realize that I don’t always have to function in the same exact way, the same role. I don’t

always have to take the lead in everything. It's important for me to help the rest of the staff be really successful."

He saw where this was played out in the staff and members of the church. They were moving to work together in a cooperative manner, rather than a conflictual one.

"I don't know that there's been a dramatic shift but their spirit tends always toward a collaborative partnership model where there's not a tug of war between staff and lay leadership for instance, where there's not a power play going on all the time, but rather where there's a kind of delicate dance that happens well where we're both listening to the music as the main thing and we don't want to step on each other's toes. We'll pass the leader and follower around as necessary as long as we can keep the dance working well."

The program administrator observed this movement toward a more collaborative model, "Kind of learning from each other and over time, I've seen more collaboration with staff, residents and staff." Early on the presence of the residents generated some jealousy among the staff toward the residents. The existing staff felt to be overlooked and underappreciated. But as dialogue opened up among the residents and the staff the attitudes changed. She said, "Once the dialogue started happening they started treating each other more like equals."

Another example of the equality among the group and spirit of collaboration is seen in this statement by the program administrator:

". . . again it's the collaboration of all staff. Sometimes we just all have to do stuff we don't normally like to do. We got a big mailing; we're all going to go stuff an

envelope. It's going to be everybody from the highest paid minister to the lowest paid admin person, but we're going to go stuff them together and make it fun."

Staff learned within this experience of having the residents to be more appreciative of one another and accepting of each other. Doug commented, "What I mean by that is I think it is, it is incumbent upon the staff to welcome the residents and it is incumbent upon the new residents each year to want to be welcomed by the staff, you see. And we have also learned this . . ."

The collaboration in ministry was also evident in that the residents and the existing staff could learn from each other while working alongside one another. Mark, the Associate Pastor speaks to this value:

"What we learn by working side by side with them is invaluable and let me give one illustration of that. One of the things I've set up intentionally is for our hospital visitation. . . . it's set up so each day we have a staff minister and a resident assigned to do hospital visitation together. I've done it that way for two reasons. One is we learn from each other; and, what I usually tell the residents is this is not about you learning from the minister, it's about both of you learning from each other. Yes, there's value being a resident learning alongside of a minister because young pastors make the mistake of being in a hospital room – it's time to pray for someone and you can't remember the name of the person you're talking to. I recall one incident where the resident who was with me was supposed to lead the prayer and he was so bumfuzzled – every head bowed, every eye closed – and he's reaching for his pocket for the hospital list trying to look at the name of the person who's in the bed in front of him. So that's a learning

moment. We were able to get in the car after that and immediately dissect that thing. So, we're having conversation. A lot of times, when we leave a hospital room, even in the hallways, walking to the car, I will try to engage a resident and say, 'OK, why did this work that way? Why did we need to stay longer there? Why did we not need to stay there? Do you understand why I cut that short?' So the learning happens there. But, there are equal number of times that the resident has a unique connection to the person that I don't have and they're able to reach out and touch them, grab hold of them, pray for them in a way that's much more meaningful than what I would have done. So I also learn from them, and I think that's true for all of our staff. Second reason I do this is back to this question of purposely getting staff to interact with the residents. By assigning residents to two by two hospital visitation it puts a resident and a staff minister in a car together and that's some great conversation time. I know from my own experience it's a great time to catch up, what's going on, just that isolated car time. It's like, as a parent, when my kids were younger. The time I learned the most about what was going on was when I was driving to some place in the car. You get their friends in the back seat with them and they forget you're there. This is sort of like that; you have those intentional times of conversation It helps our staff. It helps the resident. And, our folks who are in the hospital or in rehab, they love to see the residents when they come; and, it also teaches collegiality in ministry, rather than the lone ranger model of ministry. There is value in two. And, gosh, there are numbers of times when we go into a hospital situation where it's exceptionally helpful to have two people there because one person can talk to a patient and one

person can talk to the family or to the nurse. You have to divide and conquer sometimes whereas if you're there by yourself you really can't do that. So, that's another big positive I think we get out of this."

Laity Engage Ministry Identity

The lay mentoring committee that meets with the resident is a place where this collaboration between staff and laity had opportunity to grow and be tested. Early on in the program, they did not have a set of guidelines and were left to determine, as a group what to do on their own. They actually discussed with the residents how they could be of help to him. Robert told of his experience,

"... and so we sat down with David and we said, 'Look what we want to do is find out how best we can help you. Don't be bashful with us tell us what you need whenever you need it, and let us just build on that kind of thing. You know that we're a resource for you but we don't want to help you in things that you don't need help in, or that you're already getting support from someplace else.'"

Later, Robert shared what this experience taught him about ministry. He said, "I think, I believe that with all my heart that ministry is the job of the church. It's not the job of the staff; I mean it's part of their job but unless you get everyone involved you can't do ministry, or you can't do it effectively." He said later when sharing about a personal tragedy he and his family experienced,

"I think that's one thing that really brought that home how important the ministry of the church, not necessarily the pastoral staff, but of the church including the pastoral staff and the lay members are, because they have brought us through many a trial and tribulation and this was probably the greatest."

Larry came to learn more about these other members of the congregation that he served with and that there was strength in their work together. “I also learned that the folks that served on the support group with me, were very resourceful and I didn't have to worry about coming up with all the answers.” The complimentary gifts and resources each brought to the experience were evident as they would meet together with the resident.

“And when we did meet, I was just amazed to find out how many resources people actually had to bring to that experience. I found that there were things about other folks' backgrounds that tied in to whatever our agenda was for that day. And so there was almost always a pleasant surprise regarding resources that other folks in the room were able to bring to the table.”

As the residents worked together cooperatively they modeled a non-competitive approach to ministry, and the church leaders saw this. Dennis, one of these leaders, expressed seeing cooperation and collaboration that the residents modeled.

“So you really start learning about what does it mean to live the life of a believer within a pretty good sized body by watching them and how they work together; and, how they support each other and the rest of the church . . . that's been really good for us.”

Dennis made the further connection that their example taught them as a church to work together and draw upon each other's strengths.

“And so you kind of stand back, you think well there's going to be a little competition or friction develop. When it doesn't you realize that's the way it ought to be; that's the way it really should be amongst us as well, as a body of

believers in that community of faith. And I guess what I'm trying to say is what they've said in their teaching and their preaching so far has been great; but, the example that they've lived has been really much better."

Pastoral Ministry Realities

The mentoring relationships that both the laity and the existing staff had with the pastoral residents provided insightful perspectives on the humanity of ministers and the realities and challenges confronting ministers. The laity, particularly through the lay mentoring experiences, had the opportunity to hear the struggles while in a role of providing support. Hearing residents' challenges gave these laity opportunity to recognize that the church's regular staff face similar experiences. The staff recognized the value and significance of congregations that are supportive of staff.

Ministers are Human, Too

Through the process of meeting regularly as a committee of lay people, these church members had opportunity to get to know these individuals as people and as young ministers. The process also gave them an inside view of the whole of the work of ministry. Larry said:

"Those who serve as staff here at Wilshire, as well as my experience with other churches, tend to minimize their workload or their contributions. They don't advertise them. So a lot of times, we don't really know what's going on. That's not a bad thing, but maybe we don't appreciate some of the things that staff is doing. Well, the opportunity to have this give and take on a regular basis with a young resident who is also being taken through those same tasks, those same loops of responsibility and, sometimes for the first time, gives us more exposure

into what our own people are doing. Bill, for instance, might come to a meeting and say, ‘OK, I went to a nursing home today and met with a member who is 95 years old and had such and such set of problems.’ And, we sort of wrestle with his own struggle with bridging that gap. As he would talk about that, I realized that's something that Mark would have done or George would have done, and they would have done it from 30 years worth of experience. They wouldn't have struggled the same way that Bill just did, but him just talking about it helped me to realize this is part of the day-to-day business of the church. The residents help us to see some of the mechanics of what goes on.”

The program administrator reflected on the question of what the residency taught her about being a minister and said that ministers are “real people too.” She stated it is common to place ministers, because of being ordained, on another or higher level than the laity, then said, “But from where I sit . . . I see them as a complete human being that goes through all the ups and downs, all the insecurities and all the fears that’s very normal for almost any career.” Geri continues by stating that even though these individuals are called, her view has changed. “So I guess as far as how it’s maybe changed my view, again, I think it’s just that they really are human.” Robert reflected this recognition that ministers are human and real people.

“I think from a personal level it’s taught me that both our own pastoral staff and these residents are just like you and I, are just like me and other lay persons.

They have issues and problems and concerns just like we do.”

Paul observed that the experience of being on the lay mentoring committee was one not only of teaching, but of learning as well. Laity learn about ministry, and in particular learn that ministers are human.

“I think the people who have been on the lay mentoring committees and on the intimate support groups that we provide for residents have really learned a whole lot about ministry that they didn’t know. The sense of the personal side; to learn to give pastors permission to be human and how not to think of that as loss, to think of that as something that’s a positive. This person has very human needs, very human feelings and you don’t get to see that much.”

He continued by saying this was such a valuable learning:

“I think that’s very valuable for members to see that this is fully human work; that people that have all kinds of little foibles and personal problems and habits and real lives are pastors and that at some level it’s what makes them good pastors.”

Dennis, a church leader, echoed this observation, “Watching that sacrifice it takes to try to be successful in their roles is very humbling.”

By working with new ministers, and being in a teaching role with them the congregation became accepting of the humanness of these residents and supportive of the learning process. The program administrator described the congregation as “being gracious and merciful and forgiving and not expecting them to be perfect. To expect them to do well and do excellently, but also a little leeway in there if they’re kind of stumbling and look a little fidgety and scared and nervous.” The significance of the formative role teaching congregations play is important for the support of ministers throughout their service in congregations.

Realities and Challenges of Pastoral Ministry

The staff who worked with these residents and the church members who worked with them, particularly those who served on the support committees, came to know them more closely. They also followed these residents after they left Wilshire. Therefore, they became aware of what happened as they moved along in their career. They took special interest in their formation, much like one does their own child, and had a deep investment in what happened beyond Wilshire. As a church they saw the impact of what happens in a church setting. “We had one that probably got ran out of the pastorate where he was. There was some conflict and it’s unfortunate but it’s even more unfortunate that things like that happen in a church.” This church leader stated further,

“And then we had one that I’d almost considered it like pastoral burnout. I don’t think people look at that or consider that when you think of a pastorate – you know ‘it’s Sunday and . . . God is love . . . everybody gets along’ – and they don’t always do that even if they are a Christian. I mean there are always conflicts that arise.”

There develops an appreciation for what these individuals do, and make a commitment to do. Dennis commented,

“But watching those who have stayed on that path of going into full time ministry, going into a senior pastor at a church, that it is a huge, personal challenge. Again a kind of an appreciation for what they are doing . . . and I don’t know if George has given you an account of the various sorts of trails that each one of them have gone through, but some of them have had some pretty tough encounters with churches after they’ve left here. It’s not easy.”

In the role of preparing these individuals for ministry Robert recognized the presence of adversity when working in a congregation. “I think that one of the things that we need to do is to better prepare young pastors for going out and dealing with adversity when they run into it in a church.” He referred to this adversity with the later comment:

“But I think it’s so unfortunate that those two young men went out there, loved by their church who were wanting them so badly, and then because of one little kind of misstep or perhaps one ill-advised kind of thing that idyllic situation just went away. As I say it’s cost one of them and cost us a very good pastor.”

There is recognition that though clergy experience mishaps, insecurities, and fears that are common to people in other careers, pastoral ministers do face difficulties unique to the profession. Geri noted the “uniqueness to this ministry,” and that “congregations can be rough on a pastor. So I’ve seen that side of the ministry that I didn’t realize was there before.”

The uniqueness of the work and commitment of ministers is visible among the laity. An authentic appreciation for the calling and the commitment that individuals make to enter and stay with the ministry was evident in the expression of Dennis when he spoke about what he learned:

“Anyway what I learned about the ministry is like I said it’s a whole new appreciation for people who dedicate their lives to doing that and really stick to it knowing that those people could go in a lot of different directions. Their capabilities are there to take them in any direction they want to go. And see them apply themselves to that and stick to it is, it makes you want to get behind them in

some ways. It's not anything that I could ever do but I can support them in other ways; I've learned to work together."

Other challenges include the continual demands related to ministry. This church member, Janice, recognized that everyone, as a Christian, has a responsibility to serve, but that these individuals who are training for a career in ministry were involved in a "really concentrated placement. I mean, they are always on. And they have to work real hard to have balance and down time."

Laity also recognized the challenges for these beginning clergy when seeking placement beyond the residency.

"I think first of all we've learned that the source or the field for new pastors was a lot smaller than we realized We've learned that the other side of the story is they come through the program trying to get them placed in kind of the right location and open up opportunities for them; it's not always just an immediate thing. It's something they have to really work at; sort of finding the right connection."

The challenge in placement intensified for the women seeking a place of service. Dennis recognizes that the women have a more difficult time because of their gender.

"You know watching them going through that it's hard to see them put heart and soul and then at the end of the residency there's just this kind of huge canyon of what do I do next and what are their opportunities."

In speaking for what this experience has taught the church as he spoken to the learning of the challenges in finding placement,

“And anyway I think we’ve gotten an education on that, that most of us as lay people just had no appreciation for it whatsoever. So what does it teach you? I think for me anyway it says, gosh, do everything you can to be supportive of these young people.”

Additional challenges are present for the women in this field. Janice recalled her observations of the meaningful, supportive mentoring relationship that the pastor emeritus had with the existing pastor. “They had a great relationship and they were two fine and wonderful men.” She made the connection of the importance of such a relationship for females in ministry and the challenge that persists.

“What I see as a real need is for women to find role models that can be that for them as Bruce was able to be for George and other pastors have been able to be for George. And it’s just easier for the guys, I think, to identify with. And the women, and we’ve got some strong candidates now that are coming out of seminary that do want to be pastors and we don’t have the churches ready for them. We had two strong ones this time and I thought, you know, we, we could, could bring two women in this time. We were always challenged by that, that women can find a place. But I thought, ‘if you build it, they will come.’ Kind of, if you get enough preachers ready and trained effectively then churches might take the opportunity.”

One of the current residents, Shelton, recognized the connection that the church members made with seeing the challenges of ministry. The resident used one of his experiences in premarital counseling with his support committee. He took this in a

written up form to the committee as a way to seek their input and advice on what they could share with him as a new and learning minister. He said of the experience

“That was a really fruitful exercise for both of us, for them to realize, ‘Hey, we didn’t really know that these are conversations that ministers have to have on a regular basis.’ More and more now in our religious climate; I really felt for the first time they were with me; that they were really with me from that point forward, being really aware of the struggles of age and kind of the religious climate out there.”

One of the residents, Cindy, now serving full time in a congregation, referenced a challenging experience that another resident from the program had when he was serving in full time capacity in another congregation. From her vantage point of looking back and observing the reaction of the people at Wilshire, she said,

“I think that was a huge learning for Wilshire congregants to see a minister “fail” and yet they loved him and knew him as talented and gifted; and they knew it wasn’t just him. They knew that there is a whole dynamic behind church life and it opens their eyes to see the dissension that can happen between deacons and leader, or other leaders. Because they were seeing this, this was one of the residents who failed and yet they didn’t see him as a failure. They saw him as someone who was going to learn from it, and that church had some major dysfunction. So they’re absorbing all of this. They can’t not be changed by it.”

Ministry challenges continue beyond these initial years. Doug’s comments reflected the significance of the supportive role of congregations: “And if churches don’t play a role in the nurturing and care of young ministers, most of them won’t survive.”

Alan commented on the importance for ministers to have a network of support outside of the congregation: “You need a sounding board because pastors and staff members are people too”

Value of the Teaching Role

The staff and laity of the congregation acknowledged value and appreciation for the role that the congregation has as a teaching congregation. They viewed their participation as a teaching congregation as a significant opportunity. Recognitions were made of the investments they make in these beginning clergy. The investment was viewed as extending to the future congregations in which these residents will serve. As one of other teaching congregations, they see their engagement in the inductive phase of clergy education as making a positive contribution to congregational ministry in general. The future investment includes the benefits their own children received and positive impacts to their own congregation as well. As a teaching congregation the teaching relationship promoted a mutuality of benefit and reciprocity of learning.

A Significant Opportunity

Individuals recognized being part of a teaching congregation as unique and special. Geri had a dual perspective having first served, while a member of the church, as a member of the lay mentoring committee.

“Well, I remember in those early days when I was on the committee and as the time was nearing and I didn’t know what was about to happen with my career, just how much, how cool I thought this was . . . that we can help shape these people in their ministry. . . . And then I guess as each year goes you think of how

it really is continuing to be spread everywhere . . . I think how important it really is for them, but for us to get to be a part of that”

Even church members, who are not directly involved with the residents through one of the committees or by serving on the board, shared in this identity and ownership of being a teaching congregation. The program administrator shared,

“I sense that most people feel that they are part of the encouragement and the support, even if they’re just in a Sunday school class and they allow a resident to come in there and teach. You know, they may not be involved in anything else in the church but having them come in and teach, they have had their hand on that resident’s development.”

Robert, a lay mentoring committee chair, spoke of seeing that the congregation saw this as a valued role.

“I think it has taught the congregation two things. One, they have been a part of something really important. . . . But I think our congregation has embraced this because they realize it’s allowed us to become something, part of something really, really important. Two, we’ve done some good things, not just with Wilshire, but we the churches that are doing this training of young pastors.”

Robert identified the experience for the church as valuable. First making recognition of the value in his comments regarding what the church has learned; and, later in his response when asked what advice and recommendation he would give to another congregation that sought to get involved in teaching and preparing young beginning clergy.

“I think everybody that has been involved in that said it’s an important thing to be a part of. It’s an important thing that we’re doing; it’s a good thing we’re doing. My personal opinion is it’s the most important we’ve done in the time we’ve been here. . . . Whatever the cost it’s worth it, yeah. And the cost is not that great, it’s more of a cost in terms of commitment and people and resources rather than money. But it’s worth it; how better way to spend some of your church resources than to prepare somebody to carry on.”

Doug, with the perspective of both participation in the residency and the vantage point of observing and interacting with the members, affirmed the perspective of the laity.

“I think having the *Pathways to Ministry* program here has been significant for the life of the church. I think the church feels like we are investing in the future of the church out there. . . . I think lay people love this idea that this is a contribution to the future, it's a contribution to other churches, it's a contribution to the world beyond us. It's not all about us.”

Contribution to the Future

Paul reflected on his observations about what the residency has taught the congregation. His comments indicated the congregation looks beyond itself, and seeing their activity as a contribution to the future. At the same time he noted this as a rare characteristic for a congregation, which typically looks to preserve its own existence.

“The predominant thing I think it’s taught them is that there’s a walk there for them. There is a part of being faithful that empowers people outside our home congregation. Congregations in my life time tend to want to be pretty self-focused

and pull in. I think what's remarkable about the energy here, about resident ministry and pastoral ministry teaching has been this sense of, these are people and seeds that we're planting that we'll never see bloom or flower. But these are folks that we're sending out who will bloom and flower in other places. To me that's a culture shift for a local congregation because I think as congregations form and develop and mature they tend to pull in."

This is a formative process that forms not only the minister, but is forming a core of identity within this minister that will continue Wilshire's core values in the church he or she will serve in the future. The members believed that the investment they make is in more than a person, it is an investment in the life of congregations as they know it. In speaking about what the congregation sees in this experience, Paul made comparison with the establishment of churches that occurred in the 1940s, 50s, and 60s.

"But the long term of that is that they also see that the kind of church that they know and love will live on in the lives of the people that they've had influence with; then no matter what they go to and no matter what worship styles change and other things, the core, their cores will have some formative basis here."

Dennis commented that prior to this experience he did not feel like the people of the church had any appreciation for what was involved in the development of pastoral leadership for a congregation. However, their involvement as a teaching congregation has shown them how important it is, and how the congregation as a teaching congregation has an important role to play in that.

"But we still had no broad appreciation for how the leadership, a church leadership is formed and educated. Now we do have a much greater appreciation

for how important that is, how fragile it can be at times; how a congregation can have a huge impact with supporting that.”

As he continued, he connected the increased awareness in the church with the awareness that the church recognizes it is making a contribution for the future of congregational ministry, not solely consumers of the work of others.

“We have a much stronger awareness of that and our responsibilities and our opportunities to support that and help it grow. I think before we were just kind of takers, and just on the receiving end. Now we really feel like we’re on the contributing side.”

Mutually Beneficial

The members and staff acknowledged these residents benefit and become better prepared to serve full time in a church setting. They also recognized they are recipients of benefits experiencing a mutuality of learning and benefits through this teaching relationship. Paul stated, “I think we’re helping people be healthy ministers. At the same time I think it’s helping us stay healthy here too. It’s a nice relationship; it has a ying and yang to it that fit together nicely.” Janice identified the mutual aspect of benefit that occurs as the residents gain in experience and receive training in the act and craft of preaching. “But I just think the benefit is that we get to have diversity in our pulpit and we’re also encouraging and growing dynamic, young clergy.” She recognized the congregation benefits from hearing multiple voices in the pulpit, while at the same time claimed benefits at the personal level.

“And so we benefit as a church from having them here. But they also leave here with experience that helps them in the crisis management that they’re going to be

doing as they start new programs, inherit programs good and bad that need to be, perhaps reshaped for the future. I personally have benefited much more than I have contributed from being a part of the church.”

One question asked was of the hypothetical situation of another congregation making contact of the interviewee seeking advice on the possibility of their congregation starting a program like this. The question was intended to garner what value they had in the program, if they believed if it was worth their time, and as a result, provided another way of stating what they had learned and taken from this experience. Shelton, a resident at the end of his two year residency replied as follows: “Well you know what my answer is going to be. It’s absolutely worth it. Your congregation will absolutely get something out of it, even if it’s not what they expect.” Janice recognized the reciprocal nature of their teaching in her response to this question. “Yes, I would encourage churches to do that because when you teach anything, you become better and more knowledgeable and wise.”

The reciprocity of the teaching and learning had a strong and direct impact on the staff. Staff voiced it made them better at their work. The experience of having the residents also provided for a “constant continuing education process.” According to the associate pastor,

“Again, it’s like the difference between this. You can understand something by writing it small on a piece of paper and tucking it away; but the residency forces us to write things large on a billboard so that we can’t ignore them. We see in the residents the very things that we’ve got to be continually learning ourselves. So,

it's like, for us, a constant continuing education process. Who needs a seminar when you have residents? I could save going to a conference.”

How Do These Learnings Occur?

The second research question asked “How does the congregation learn?” Given the various learnings that staff, laity, and residents experienced, these findings turn now to explore how learning occurred. Reflection on personal practice is one of the ways in which people learn in this system of pastoral residency. Another significant area of learning occurs through the example and experience of modeling. Member conversations reveal some signs of learning. Organizationally, there are some examples of single loop and double loop learning.

Table 6
How Do These Learnings Occur Findings

Research Question	Finding from Data	Sub-Category of Findings
How Do These Learnings Occur?	Reflection on Personal Practice	<ul style="list-style-type: none"> • Mentoring Role Generates Reflection • Residency Promotes Reflection
	Effective Modeling by Key Leader	<ul style="list-style-type: none"> • Influential Visioning • Engaged Leadership
	Single and Double Loop Learning	<ul style="list-style-type: none"> • Single Loop • Double Loop

Reflection on Personal Practice

Participating in a teaching and mentoring relationship gave cause for the staff to reflect on what they do. Through this reflection the staff made discovers, learned more about their own work, and became more self-conscious. The overall design and structure of the residency program in the teaching congregation generates an environment of reflection.

Mentoring Role Generates Reflection

The pastor identified that being in the role of a mentor and teacher pushed him to articulate what he does which increased his awareness and made him more self-conscious of his actual work. Having the residents and the responsibility of teaching them naturally forced personal reflection and critical reflection about his practice.

“So having residents learn these practices of ministry requires that I be able to articulate why I do what I do, how I do what I do, why I don’t do some things and do things in this way. So I’ve become a much more self-conscious pastor, in terms of practice. I’m much more aware that I’m being watched and that I’m going to be called to account by residents for what I’ve done and why I’ve done it that way because that’s part of the reason they’re here. . . . So I’m probably a better pastor as a result. It’s a funny thing isn’t it?”

Through the self-reflection, disclosure, and honesty of the pastor with the residents there was an opportunity for the residents to learn from his experience in real time. One of the residents, Cindy, shared from her experience of these times with the pastor. The comments indicate the active reflection of the pastor with the residents and how this provided for the residents’ learning.

“So he would come to us and say, ‘Well this is what’s going on and this is really hard for me.’ And he would seem like he was really struggling. So we got to learn from that. And, I think he listened to us. So what we said influenced him which then influenced the congregation.”

Paul shared how this role of teaching created reflection on his practice as it caused him to think about what he does and become more organized.

“I think it’s given me some insights into my own sense of ministry. It’s certainly forced me to be more studied about the information I have. I’m old and gray and I’ve done this for a long time. When I’m teaching, I’ve never taught anybody else this stuff so when I had to sit down and figure out how to teach people how to do stewardship versus just my eclectic knowledge, I think it’s helped me kind of organize myself into ways that I’ve evolved. I mean after 20 or 30 years at this you probably should figure some system out. But I don’t know that I’ve ever sat down and tried to create anything that categorized and put any kind of linear dimension to that at all.”

Mark echoed a similar experience about how the role of being teacher leads the practitioner to reflect on and pay attention to his own role and leadership, and how to express what he does.

“The number one thing it does for someone like me is it causes you to have to think about why you’re doing the things you’re doing. So that sometimes that’s because residents are challenging you and saying why is that so? Well, you can’t take the parental approach and say it’s because I said so. That doesn’t fly with most of them. So it causes you to be on your toes because you are working in a living lab and you’re mindful of that, that they’ve got eyes on you.”

The teaching and mentoring relationship promotes learning in this lab environment during unstructured time as well. Reflection on and in practice is evident for Mark as he described what is a typical setting and conversation a staff member will have with a resident.

“We would often just sit down around the table at the shire, or at lunch somewhere and they would say, ‘OK, could you explain what’s going on here?’ So here’s the story behind the story and we get to process. I think that those are really valuable learning times, which also gives me, as a staff leader – I’m also processing while I talk – so when you have to explain what you’re doing, it caused you to be more thoughtful about why you’re doing what you’re doing. I think that’s the best result that a lot of us get is working this lab type environment. You’ve got to be able to explain what you’re doing and that causes you to be more thoughtful and to be on your toes. So, the residents gain from the conversation but we also gain from being forced into the conversation.”

Mark made the concluding affirmation that the experience was mutually beneficial to staff and residents. “So, the residents gain from the conversation but we [as the staff in this situation] also gain from being forced into the conversation. You can’t easily become an isolated dictator in this structure.” The role of teacher and mentor offers situations for reflecting and evaluating what and how one as a staff member functions.

Residency Promotes Reflection

Reflection also occurred within the research interview process. Not only does the value of reflecting on practice become evident as a means for how learning occurs, the value of providing opportunity to reflect also appears. As Mark answered the question, his reflection on the experience generated additional discovery and possible application for future practice. He was sharing about their process of vetting and interviewing candidates for the residency program. The follow up question to him inquired if that

experience of including not only staff but additional constituency groups in the interview process might influence hiring practices for permanent staff in the congregation.

“Our process ultimately culminates in a candidate meeting with constituency groups from whom we get feedback before things move to a final stage. So, I think that might solidify that certainly – and I’m processing this even as I speak because this just happened last week. So, yeah, that’s a good point.”

Geri in the interview made a connection with her personal experience in student teaching. She reflected on her experience in apprentice learning and recognized the similarities and relationships between them.

“I think this is something that was needed. I didn’t know much about divinity in their school and what they did and what they didn’t do. But just knowing that even my student teaching, going back to that thing, I still wasn’t completely prepared, but I sure was a lot more prepared because I’d done that than if I hadn’t done it. So I think I really bridged those two and saw that as similar and thinking how cool that was.”

Paul shared that the church members learned through the process of mentoring. The comment also indicated that reflection on their practice and their lives occurs in the process.

“Mentoring others has helped them explore their own call to ministry much like I was saying it has done for me. I think it works at the lay level as well as at the ministry level. I think it really has helped people look at their own lives and see how they act, and they act in a way that says all of us feel a call if we have ears to hear. I think that’s part of it, is learning to have ears to hear.”

One resident exited the program early. These comments from Geri indicated her own reflection to her previous career and how the organization learns, adapts, and clarifies its identity.

“I think it really taught us who we were and who we were not. Because I remember telling George, ‘OK, this goes back to my athletic career. We’re a Division I program. He probably could have done fine in a residency program, but not this program. He may need a Division II or a Division III program. This is a Division I, we only need Division I recruits to be here.’ So that helped us really start to tweak; we didn’t change a lot of our recruiting but I think there’s a lot of intangibles that we really were able to dig into. I can’t really put words to what we do differently, it’s just having that experience helps us to know better what we’re looking for now and whether or not we think this person really fits at Wilshire.”

Reflection on the practice of pastoral residency occurred in the midst of the research interview process with laity as well. The process of talking about their experiences and bringing them into their consciousness sparked reflection. Alan reflected, “Well good I really hadn’t thought about that much until you started asking the questions. But that’s kind of what I picked up on, that’s kind of nice to see that.” Janice recalled the loss of the pastor emeritus and his gift to help initiate the pastoral residency. It is another example of reflection during the research interview that generated learning.

“I hadn’t thought about it until right now but I wonder if the clergy apprenticeship program, *Pathways* helped us through that grieving process of losing Bruce. But, but having him say this is how I want the memorial to be spent and helping us to

get up and kick it off with that was, for me, it probably was. And that's been good. Although like I said, I don't know that I've ever connected the grieving process with the development of the clergy residency."

The pastoral residents gave examples of how the design of the program used reflection as a tool for learning. Shelton referenced the teaching and learning process that occurs in the lay mentoring team as example of the reflection. "The residency is designed with a lay support team in mind and my primary sort of congregational teaching apparatus has come from that group as we have debriefed after a sermon." Cindy referenced that each week on Monday residents met together with the staff to evaluate the worship from the day before. The activity of reflection on their practice seemed to be a quality that the whole system utilizes. Not only did the individuals reflect this in their conversations, it seemed to be a group practice as well.

"Even on Monday morning when we come in for worship planning, we would all as a group, as a staff, as a group we'd dissect Sunday's worship and talk about it, what went well, what didn't. So it was very much always getting feedback."

Learning through reflection occurred for this resident as she was in the process of interviewing for a pastoral position in another congregation. The reflection took the form of verbalizing her experiences with the members of the search committee of the church that hired her. Near the end of her residency she had an interview with a congregation for a full time position as pastor. Her interview served as a reflection experience which brought to her awareness things she had learned through the residency.

"When I had to verbalize it and name it because even though we did do some self-assessment and peer assessment and a six month review. I think there's something

about saying it out loud to a group of people that don't know you or Wilshire, and you have these 'ah ha' moments like, 'Wow look at all this stuff that I've learned and now can say with such confidence.' When I went back to Wilshire – because I was still there from April to July – those last month's I definitely noticed a transition for me. I felt like I had a pastoral confidence and authority; and, I think people noticed that because a couple people even said that.”

Effective Modeling by Key Leader

Staff and laity commented that the leadership of the senior pastor and his active involvement and investment has served to be significant in the growth and development of *Pathways to Ministry*. The senior pastor and his inspiring influence on the residents, the staff, and the laity, surfaced through various questions including these two: “Will this program continue after the pastor is gone?” and “What would you advise to someone from another congregation considering the start of a pastoral residency program?”

Influential Visioning

One of the laity responded to this latter question with these words, “I can only tell them what my experience has been. We went into this you know excited because George is an exciting leader, and he showed us, or told us what his vision was for this.” Alan, a church leader, spoke about the vision and influence of the senior pastor from the start of the program.

“I think it was a lot of foresight on George Mason's part. I think that's something that he saw a need for. . . . And I think – George had never expressed that to me – but I just think that was something he was thinking and saw a need for it. And it was an opportunity. George is a very impressive individual, quite the word smith

and extremely knowledgeable and I think he started looking at it and then when he found out the situation with Lilly and how some of that funding could fall into place that it got started.”

The residents had been asked about the expressed identity of the congregation. Was the expressed identity consistent with what they observed and experienced? Cindy, an alumni resident, affirmed the consistency then pointed to the role and influence of the senior pastor as a primary factor. “Yes, yes. There really was. It is a church that knows who they are and I think George has a big part of that”

Several responses from the program administrator indicated how the senior pastor’s modeling and influence was instrumental to the shape and learning through the residency. First, when asked how the congregation responds to the residents when they make mistakes, she replied, “Very, very gracious. Again, I think that comes from George. I think it comes from George in a very indirect subliminal way from the very early stages.” She continued with comments about how the congregation was learning to be a teaching and mentoring congregation.

“You know, I guess we’re training our congregation to be mentors and trainers of these ministers that come through here. Again I think just George’s talking and explaining of what we’re doing, and bringing in high quality people.”

A final summation offered by Geri of the congregation’s participation as a teaching congregation,

“I think George has done a phenomenal job of making it who we are. Not forcing it to be who we are, but just naturally letting it be who we are, and how he does that, I don’t know. I think that’s just a gift that he has. So I think this church is

very fortunate to have George and Mark leading, because they both bring kind of very different things that I think the congregation just really continues to grow from in very different ways.”

Engaged Leadership

Other staff recognized that the pastor’s role and leadership was instrumental.

They saw him as engaged, active, and intentional.

“George is certainly integral in getting the thing going for a few turns . . . He gets grants because they know he’ll produce and he doesn’t short shrift anybody when it comes to this program. He puts his energy into it as he needs to and it’s important.”

Mark valued this leadership by the pastor. His response included comments based on perspectives from his own studies of other congregations who have similar programs.

“. . . you have to have a senior pastor who is fully on board with it and one of the huge keys to the success here is this is George’s passion and he gives his all to it. Through my recent sabbatical research, I visited another church that has a residency program. I visited several. But one of them does not operate nearly on the level as ours because the senior pastor is not engaged.”

The personal leadership of the pastor bred enthusiasm and was important to success. Laity recognized that the pastor was engaged, involved and committed to the program. Robert commented,

“I think the other thing is the personal leadership that George has shown in it. He has devoted untold hours of effort and time and work toward making it a success. And that has enthused everyone else too and gotten them excited about it. George

didn't just start it and then you know sit back and go do his other CEO things. He stayed with the program and has grown it, has made sure that we have the resources, like Geri McKenzie, and all the other resources that we have to make it a success. And I think that's important; you've got to have continuity from the top,"

Responding to the question on the prospect of the pastor transitioning out of the program at some point in the future, Dennis identified the strength of the senior pastor as a mentor. "Well that's a good question because obviously he's been the heart and soul of making it go and I really do think a lot of [the residents] are drawn here because of him. No doubt about it."

Finally, the following self-description of the pastor's leadership style is illuminating. It shows his clarity of vision, a determination, and the ability to leave room for learning to occur by others, what he calls "strategically defaulting."

"I lead best through my strategic larger vision approach, and also by defaulting a fair amount of the time, you know, strategically defaulting. Freedom of terminology of course, but defaulting in place is sometimes a way to give people the chance to thrive around you and not always have to be in the middle of it. So I maintain often a kind of plausible ignorance that allows people to say, 'Well why are we doing this now?' 'You know I'm going to have to ask about that I'm not sure but it's a good question I'll get back with you about that.' 'Well you don't know?' 'Well no actually.' I want people to understand that I don't have all the answers to everything going on around here."

Single Loop and Double Loop Learning

In single loop learning gradual changes or developments occur in response to individual discoveries. Results may be new strategies, evaluation of previously held assumptions, and recommendations for others. Double loop learning is deeper learning that moves beyond individual discovery and recognition of error. Individuals and systems, make application of discovery in a way that reflects a reorientation of perspective.

Single Loop

Discussing what he learned through his experience Dennis shared about the early phases of the program. During this time the existing staff were feeling a bit pushed aside and somewhat neglected. He acknowledges that this was not intentional, nor was it anticipated. His discovery has taken a solid form of advice for others.

“Anyway it began to be a pretty substantial number of people who were involved in the program. And I think there was a stage in there when some of our staff felt not as important to the church as they had felt before. So anyway if somebody’s trying the program or trying to grow that type of program in a church it would be a word of caution just to anticipate that.”

As he continued the conversation he indicated that there were other efforts made to gain more integration of the existing staff and the residents to address this situation.

“Well I think there was a little bit of tough love that said, ‘Hey we’re going to do this, we’re going to keep doing this it’s a vital part of our church, so work through and get in step and come along.’ I think there was also some more deliberate attempts made to develop staff and opportunities and include them in the program

as well. It felt like for a little while that the two were almost side by side, not competing but not integrated either.”

Another experience in the early phases of the program stemmed from a situation where one of the residents exited the program early. As of the date of the research interviews it was the only admitted resident that did not complete and graduate from the program. Evaluation of this and feedback from others in the system led to a revision of their practices in the selection process. These adaptations were not only about revising the process, but also generated a change in their understanding of what they were looking for in the selection of candidates. The associate pastor gave his perspective on this.

“I will say that it was really instructive to us in processing this afterward to realize some things to look for in preparedness and also in communication to candidates about what’s expected. . . . More importantly, there was a profound cultural mismatch and this helped us to gauge in the future making sure not only that we get people who are theologically trained but are capable of coming into our particular culture and succeeding.”

Double Loop

One specific story told by a lay mentoring committee chair, Larry, was example of double loop learning in this organization. He first related a situation in which the pastor was giving instruction to some of the lay leaders about what was appropriate and inappropriate feedback to give to female residents.

“Our pastor, George, made a comment about feedback being given back to a particular female resident. He reprimanded us for, I’ve forgotten what the comment was, but it was something like, ‘Don’t you look pretty today?’ It was

denigrating, a little bit underwhelming, actually. I guess that was an example of our learning to be more sensitive to more people who are not exactly like us.”

As he responded to a question focused on what changes he had observed he shared a story which reveals how he incorporated the previous experience of instruction from the pastor and made application to a new setting. As indicated in his comments, these events were separated by years.

“Now there's a congregant here, dear lady, who's quite a bit older than I am, I'm just going to guess somewhere around, maybe, age 80 or so. And there's a particular male resident that she's really attracted to. She just thinks he's so cute and she wants to go up and pinch his cheek every time she sees him. Well, I figure that's the male equivalent to telling one of the female residents that they look pretty, you know. So I kind of scoured her about that the other day, suggesting that, maybe she should comment on the sermon instead of how cute he looks in that suit. And I saw her giving critical feedback to him the next time that she was with him. So, you know, maybe we're all just growing up into this. I don't know I was uncomfortable with saying anything to her about it but I thought this really feels like the example that George gave us a couple of years ago, only applied to the other gender. So I thought, I guess this is all right. She and I have a good enough relationship that I think we were able to have the conversation without it alienating either one of us from the other one. We're still on speaking terms, so I guess it must have worked out OK.”

What Factors Facilitate or Impede this Learning?

The third research question focused on discovery of the factors that facilitate or impede learning. Interviewees' responses about their involvement in the residency program of inductive clergy education contained information on what factors led to their learning and discovery. The leadership of the *Pathways to Ministry* program is intentional in involving laity in multiple areas of the residency. Involvement of the laity made possible opportunities for learning. There was also an attitude and environment which made space and allowed for laity, as well as the residents, to step in and take on leadership opportunities. Surprises, mistakes, and conflicts do occur within the context of ministry and the residency program. Described in the findings as contextual jolts, these occurrences stimulate learning for both individuals and the organization. Each year two new individuals are introduced and integrated into the congregation. Their interaction and leadership in one-on-one relationships, group settings and with the congregation as a whole brings an infusion of new ideas and perspectives, discouraging stagnation and stimulating creativity and vitality.

Table 7
What Factors Facilitate or Impede this Learning Findings

Research Question	Finding from Data	Sub-Category of Findings
What Factors Facilitate or Impede this Learning?	Involvement of the Laity	<ul style="list-style-type: none"> • Intentional Inclusion • Contributors through Skills and Resources
	Allowing People to Lead	<ul style="list-style-type: none"> • Creates Atmosphere for Learning • Increased Opportunities for Learning
	Contextual Jolts	<ul style="list-style-type: none"> • Conflicts of Alumni Residents • Episode of an Early Exit

Research Question	Finding from Data	Sub-Category of Findings
		<ul style="list-style-type: none"> Existing Staff Face Adjustments
	Infusion of the New	<ul style="list-style-type: none"> Expectant of New Residents Entering Keeps Members, Staff, and Congregation Alive Not Stagnant Opportunities for Learning and Discovery Applied to Whole Congregation

Involvement of the Laity

Leadership in the residency program were intentional about involving the laity in the various aspects of the program. Involvement is designed to provide a myriad of members opportunity to serve, and to make a contribution through their knowledge, expertise, and personal resources. Through the formal structure of involvement, and the informal exposure to the residents laity were provided the opportunity for interactions with the residents on a personal basis as well.

Intentional Inclusion

There was intentionality early on to bring in people from different generational groupings in the church. Geri, the program administrator and a member of the congregation, was involved as a lay mentoring committee member before she became an administrator of the program. She appreciated interacting with new people in this experience and relates the intentionality for having a good mix within these groups.

“It turned out none of us knew each other that were on this committee, which was a really cool thing. It is something we’ve tried to continue as we’ve gone along, to

bring inter-generational and maybe different parts of the church to be a representation of the church on these committees.”

The church sought ways to involve more members into the residency. They were intentional in broadening the involvement of the membership. Alan, a church leader, referenced the *Pathways to Ministry* committee which functions much like an advisory board. “I know the leadership of that is making a deliberate effort to bring new people into the program to support it. I think it’s real key.”

In discussion about how the people of the church learn the inner workings of the residency the associate pastor gave a description of some of these ways of involvement.

“So, the people who would have been on the old *Pathways* advisory group, which was the predecessor to our current *Pathways to Ministry* committee, they’ve got that all along. Every resident, as you know, has a lay advisory group around them that’s their immediate support group which has been a wonderful thing. Those people generally understand some of the structures. The people who are brought in to interact with residents at specific seminar type settings, I think they get it in a unique way.”

Laities were also involved in the residency application process. Though this was a new development in the program, it is evidence of the increased involvement of the members of the church.

“I think it was just another way of deepening the investment of lay people from the very beginning. . . . It is another way that these lay people will embrace these two new residents in a significant way because they had a part in bringing them here.”

A resident acknowledged the benefits to the members because of their involvement. During the 2nd year of each resident's tenure a group of members are gathered to serve as a mock search committee from a hypothetical church and conduct a mock interview with the residents. The resident indicated the members role play the situation very well, and that the experience is "grilling . . . but for church people to be involved in our interview and placement process is really good for the church."

Contributors through Skills and Resources

Laity were involved beyond the defined roles of the host families and the lay mentoring teams. The staff leadership looks for ways to involve laity, based on their gifts, training, and resources, to make contributions in the teaching and mentoring.

"Some of the other things that we've done, we've got the retired speech and drama teacher from Lake Highlands High School, who is now a member of the church. She's actually worked with residents on the use of their voice, not only for preaching, but just for reading scripture, just the sense of timing reading scripture, praying a prayer. . . . This is a real gift, I think, for us to have that kind of resource. We have had a lay person in our church who is a consultant with the McClellan Group out of Boston. . . . This guy has been to Pastoral Seminar to talk about emotional intelligence and the consulting work that he does with executives and, quite honestly, even does at the White House some. Here's another Wilshire member who makes a contribution that we've been able to make a connection with."

The church was committed to using members both from their field of expertise and their life experiences to engage and be part of the teaching in the congregation. These

resident comments contained examples of the variety of members who would be enlisted to participate in the pastoral seminars.

“So they would bring in a lawyer that was in the church and he would come and talk to us about legal issues. They would bring in . . . a chaplain and talk about end of life issues and this chaplain was from the church. They really try to utilize people in the church that had expertise. The other thing that was really cool was . . . in the Pastoral Seminar was an opportunity to meet different people in the church and hear their vocations and how it helped us. But another way was one time the Minister to Families with Children . . . would do a lot about grief work and she would bring in, with their permission, a family, this one couple that lost their baby and we got to sit around the table with them and hear their story. . . . They would tell us about their experience and losing this child and the things that some people said that were absolutely ridiculous and really hurtful and the things that were really helpful.”

Opportunity for Personal Interaction

Dennis, a church leader, also served on a lay mentoring committee. His comments indicated the value of his experience with the residents, as well as revealing other ways of involvement for members with each resident. This direct involvement provided him the opportunity for personal interaction and learning. He affirmed that the involvement contributes to the learning environment in the congregation.

“When I served on the mentor committee with Henry that was a huge leap forward to me to get closer to the program and understand. I was asked without really knowing much about it at that point, and they explained here’s what you do,

it's not complicated at all, here's a little bit more about the program. That's a good way because you take groups of 5 or so and get them really involved. And the mentor group, and a prayer partner, and the support family, so there's probably about 10, plus spouses, who are huddled around that one resident. And you get to know them all, you get real involved. Henry got married and they had a baby, so you're involved in a lot of that. . . . But anyway, I think that's really important the more you can disseminate that into your congregation the more grass roots support you're going to have for the program. And the more the congregation is going to get back from it too as well."

In responding to how the residency has impacted the people of the church and deepened the identity of the church Paul reflected that the close involvement and contact that the laity have with the residents is a contributing factor.

"So I think they're taking that to heart and seeing that. Especially seeing at this intimate relationship with residents that the residents delve in that world; and, then that gives you permission to get into that world too."

Seeing the value of having members involved Alan, a church leader, acknowledges the value of member involvement and importance of individuals being involved even if for a short duration.

"I think we do a pretty good job of that; we probably need to do a little better job of just getting more and more people involved, and even if you're not involved in the program for 10 or 20 years. Get involved in it for a year or two, or for a month or two, and if you need to cycle through it, just to understand what's going on. . .

. So like I said, I think we do a pretty good job of that, but I don't think you could do too much of getting more and more members involved with the residents.”

This long narrative shared by Robert gives example of how the laity took ownership in their role of the mentor and took initiatives with their involvement. By their increased involvement they were exposed to residents in multiple settings and in formal and non-formal ones.

“Most of us developed kind of a one-on-one relationship with Jordan where Bart would take him to lunch once a week, or I'd call him up and say, ‘Let's go to lunch.’ Or my wife and I – my wife wasn't on the lay mentoring team – we had called he and Ashley up and say, ‘Let's go to lunch today,’ or something. Each of the lay members did this on their own. There was no schedule because we wanted him to know that he really could call on us, he didn't have to wait until our meeting was scheduled after he preached on Sunday. . . . He could have a sounding board, he could have somebody that if he was upset about something or concerned about something he could tell us and it wouldn't go any further; that he had somebody that he could speak to in confidence.”

An example of the voluntary ways that people in the church become involved is shown here in this description of how a Sunday school class makes contact with the residents. This example reflects laity involvement and the personal engagement with the residents that provides for development of relationships in the program. “

“Mildred will maybe go by where they have chosen to live and checked it out and she has that discerning eye of what do they need, what's the atmosphere, what can we offer. And the Sunday school class does a pounding, old fashioned pounding,

so they've got food; and, if they have children they have diapers and if they have pets, they have, dog food. I mean, it's unique to who that family is. And, it's food, it's cleaning supplies, it's gift cards to restaurants."

Interest and enthusiasm among the membership has continued throughout the duration of the residency program. Recognizing the possibility that people might have grown tired of this after multiple years Robert claims that it has "not been the case here, there is as much enthusiasm, if not more, for the pastoral residency program, at least among the people I talk to, as there was 8 or 9, 10 years ago when we first started it." He continued by saying:

"And I see more and more people want to get involved with it. And I see more and more people who have been part of the lay mentoring team, or a host family, or something that aren't directly involved with a resident anymore but they're still at the *Pathway* meetings and all of these things there at the *Pathway* meetings."

Allowing People to Lead

The openness in the congregation to make space for people to practice skills and for members to be involved in all facets of the residency program created an atmosphere for learning within the congregation. The spacious atmosphere enabled the mutual exchange of learning through their relationships and experiences.

Creates Atmosphere for Learning

The program administrator referenced the transition that the pastor experienced when he followed the pastor emeritus. She indicated that the pastor emeritus provided both a mentoring role and created the space to allow the pastor to come in as a new staff person. In comparison of this environment with the residency she indicated the

importance of the intentionality in mentoring and allowing space for people to learn and develop in their roles.

“ . . . when Bruce McIver was still alive and George came in – that transition, is somewhat similar in the sense of having a mentor and training, and at the same time giving space and room to be who you are at the same time.”

The pastor has served in the congregation for 23 years. A church, as any organization, can become solely identified by its primary leader, and is susceptible to over involvement and dominance. This resident recognized some from the outside might make such an assumption. However, he identified the openness the pastor had to sharing leadership in the church. “It’s not George Mason’s church. It’s a church where the pulpit is shared But there’s this openness in sharing of leadership here.” Janice echoed this quality of the pastor to provide the space and opportunity for the residents to practice and lead. “. . . and George is very transparent. I mean he just lets them be a part of everything that’s going on.”

Increased Opportunities for Learning

The residents participated in various and multiple areas of the church’s ministry and life. This broadened the exposure they had with the members of the church and increased the opportunities for learning not only of the residents but of the members as well. Robert commented,

“Yeah it is, it really is. Getting them involved in all aspects of the church, whether it’s teaching kids or working in Vacation Bible School or coming up and teaching a senior adult class; we invite them. When we can get them we have them come

up and teach our class, but they're in great demand. So that's really been good because there is no one in the church that doesn't know those residents."

Residents were given the opportunities to preach on Sundays in their practical learning experiences. This became not only a learning environment for them, but proved beneficial to the members as well. Paul stated,

"I certainly think it's valuable to the congregation to see these preaching styles on Sunday, especially the dual Sundays when a pastor and residents are in there preaching on the same scripture in different services with different titles. I think that is for many people a revelation."

Cindy indicated various ways in which the residents were allowed to lead, teach, and serve in the congregation. She expressed her sense that the congregation was learning things not previously known.

"I really did have the sense that they were learning from things that I was sharing and soaking that up and also wanting to know more. That was definitely the most obvious I guess as I was in a teaching role teaching the Bible study. I taught in Sunday school classes and that was one of the things the residents do a lot. Almost every week we're teaching in a different Sunday school class. And they really look up to you. . . . So I felt like I contributed a little bit to their understanding of the rhythm of time and sacred time in part because that's really important to me but also to the staff as well. I think it's new to sort of moderate Baptist life. They didn't grow up with following Lent and things like that. So I helped with that I think. And an occasional retreat; they would ask me to be a retreat leader and stuff."

The members, by their openness to this program in their church, were impacted not only through the teaching of the residents, but by their presence as well. By making space for this in their church the members learn and grow as reflected by this church leader.

“Because they all have their strengths and one might be a little bit better in the pulpit, one might be a little bit better in just kind of day-to-day ministry and so forth. So you stand back, you think well there’s going to be a little competition or friction develop and when it doesn’t you realize that’s the way it ought to be, that’s the way it really should be amongst us, amongst us as well just as a body of believers, you know in that community of faith. What I’m trying to say is what they’ve said in their teaching and their preaching so far has been great but the example that they’ve lived has been really much better.”

Sharing about what he learned in this experience of pastoral residency the pastor addressed the significance of allowing people to lead.

“It’s taught me that a lot of the rest of the staff has pastoral skills that their position would not necessarily allow them to explore unless we . . . I and the church became open to allowing them to be pastors. So the rest of the staff has become less program directors and more of a pastoral staff.”

Contextual Jolt

Learning and awareness heightens for people when they experience a mistake, failure, crisis, or conflict. These can occur within the context of relationships, in life situations, work environments, and congregational settings. These internal, or contextual, mishaps break the expected rhythm. Without becoming fixated on assigning blame or

determining cause such changes, or jolts, have potential to stimulate a reorganization of practice, a reorientation of priorities, change in behavior, or further development of methods.

In conversation the alumni resident recalled a conflict within the church, giving example of a contextual jolt, and the use of this through the residency program for opportunities to teach and learn.

“One, a big conflict was there when I was there. There was a rift between the youth and youth parents. There were some growing feelings about where does the church stand on this issue. I think it’s really interesting because George personally really struggled to keep everyone in dialogue and not to get angry and leave because there was some people that wanted to leave. In fact, some people did leave and he tried to be a good mediator; but, he bore the burden of a lot of that and yet with the residents, he always gets energy from the residents and making everything a teachable moment.”

Conflicts of Alumni Residents

Following is a story about a resident who had difficulty in his first placement and the reflection by this lay mentoring chair, Robert, that there might be a need to prepare better for conflict in the church. His questions indicated his disappointment in not having prepared the resident for this kind of conflict.

“And I don’t think he knew how to handle that, and I don’t have a magic bullet; I don’t know what we could do to prepare them. . . . And we didn’t prepare him for something like that, we didn’t prepare him for, ‘Hey bad things really can happen.’ There can be schisms that are in the church, there can be things you need

to watch out for. I don't know if you could do that but I think we at least need to make these young guys and women aware that everything may not be peachy keen all the time. And so if you sense something going aside how do you correct that, what do you do? I think that's the biggest disappointment I have."

He continued this story.

"But I think it's so unfortunate that those two young men went out there and loved by their church, they were wanting them so badly. Then because of one little kind of misstep or perhaps one ill-advised kind of thing that idyllic situation just went away. As I say it's cost one of them and cost us a very good pastor."

This jolt, though in another context, became a jolt within the Wilshire context.

One of the current residents, Shelton, recognized this impact. "But, I think some people around here for a few months thought, oh gosh, we failed because seven years later this guy resigned his church."

Another alumni resident had a conflictual experience in his context. This too had an impact upon the context at Wilshire. Though it occurs in a different context, the fact that the members at Wilshire have such a deep investment in the life and work of their previous residents created a jolt for them, as observed by Cindy,

"Recently, another one of our residents quit ministry, quit preaching, pastoring. I think it calls into question, 'Is he still a minister even though he's not vocationally serving as a pastor? Did we waste our energy and time?' Well nobody feels that way, you know. People continue to believe that no, that wasn't a failure, that God's going to do something and use that in some other way."

Episode of An Early Exit

Another jolt felt within the church was when one resident left the program early.

Robert commented,

“And probably 3 or 4 months into his residency he came in and he said I don’t want to do this anymore, I’m gone. And that was kind of hurtful. I mean no one was angry it was just hurtful that you think ‘How could we miss, or how could he miss?’ I don’t think there were any ill feelings other than the fact that well now we’re several months into this the other candidates we could have chosen they’re gone, they’ve gone and done other things. I think that’s the only worse thing.”

Here are further impacts of this situation upon the system, as shared by the associate pastor.

“Yeah, so it was helpful to us. It was very painful at the time, painful for the person, painful for us. It was difficult for the lay advisory team around that person who felt like they had failed in some way. . . . It had nothing to do with their failure at all, but it was very hard for them to take, that their resident was being sent packing from the program.”

The associate pastor in reference to this early exit revealed that the jolt provided for a revision to the review process during the application period.

“So, in this moment in time, we have 15 graduates of the program which is just remarkable to think about. We’ve only lost 1, technically, who washed out of the program early on. That helped us to solidify the process, the review process.

There is a 6 month evaluation that happens that is the gate. You’ve got to, at the 6

month mark, have integrated in the system well enough to get permission to go on with the last three-fourths of the residency.”

Existing Staff Face Adjustments

Another jolt to the system was related to the effects of the residents entering and receiving focused attention and increased time with the pastor, and the feelings of the existing staff of being over looked and taken for granted. A jolt is an unexpected occurrence, one that has not been foreseen, nor has been planned for. Otherwise, it would not jolt the individuals or the system. Dennis illuminates this type of jolt.

“As this residency program took place not appropriately so but I think some of our existing staff felt a little pushed aside by the program, by the focus on it. I don’t think that was the intent or it was happening but maybe it wasn’t given enough anticipating, you know that they might feel that way and preparing them or including them in the program. And we got over that, we got through that. It was one of the unexpected, I don’t know if I’d call it a negative it was just one of the realities that developed as the program grew. . . . It’s not something that was some huge problem and it didn’t create a rift in the church or anything like that, but it was a little bit unanticipated.”

Cindy acknowledged the existence of tension among the existing staff for not having enough time with George. “I think there’s a growing frustration among some of the staff that they wanted to have more one on one time with George.”

The staff recognized that these new residents changed the equilibrium among the existing staff. The associate pastor reflected,

“In the early days, especially, our staff members were jealous of the residents. In part because the, Tony and first residents got attention from the congregation and from people that our staff members felt like they didn’t get and it was disproportionate . . . Here are the residents coming in who become George’s special projects and they’re getting attention and time from him that other staff members are not getting and there’s a jealousy that happens there.”

Infusion of the New

This perspective of a current resident, Shelton, of the flow of new residents into the congregation identified an “infusion of new energy” into the congregation every year.

“Well, you have an infusion of new energy and ideas every year because every resident is going to bring something different. So, Wilshire gives to them the best of Wilshire and hopefully the resident’s giving the best of him or herself to the church. I think the constant infusion of new energy and ideas and experiences over time is a small part of why George might say, ‘I really hope that this is the last capital campaign we do for our building. What if the next capital campaign we did was for the benefit of something outside of our building?’ And, that’s come about in loads of different ways but maybe, as a resident, somehow along the way helped plant a part of that idea. Then you got the missions minister and then you get somebody who’s really excited about something out in town and, you know, those perfect storms. So, hopefully residents help to create perfect storms of energy and ideas.”

Geri expressed how two new people each year generated momentum. “To work with these residents; every 2 years two new . . . again, it’s the fresh blood in a sense. Working with two new people every year just kind of keeps it going, and I like that.”

Larry saw the flow of these new “voices” into the church’s life as opportunities for new ideas and new experiences. The presence of these new voices brought opportunities for learning to the congregation that would not come otherwise. And, it led him to look with expectation to the next group coming in. It bred a positive anticipation and expectation for something new.

“We’ve been stretched a bit to listen and learn and to collect wisdom from new voices. We wouldn’t have had these experiences without this. . . . And, inevitably, we’re going to hear ideas, we’re going to see styles, we’re going to listen to things that we would never hear from our own staff about. And this is the right place for that to happen. It’s pretty thrilling.”

He continued later to say, “I know that I’ve changed some things that I thought as a result of listening to some of these young voices.”

Dennis referred to the “freshness” that the residents brought to into their existing groups and gatherings in the church.

“And the other, one of the obvious, is having the young thinking come in, you know with ideas, and sometimes they’re not new ideas sometimes they’re old things that they’ve refreshed for you and you know that’s good. . . . There’s a bit of a freshness there that comes in from the younger crowd that’s constantly being a part of us in our midst, in Sunday school, and teaching on Wednesday nights and so forth.”

Expectant of New Residents Entering

Each year two residents leave the program then two new ones enter. Though there was a sadness to see two individuals leave, there was anticipation for what two new people would bring and introduce, as reflected by the program administrator.

“But at the same time there’s a bittersweet moment because you think oh, there’s two new ones coming. That always kind of helps offset; you’re so sad and oh, I can’t believe you’re leaving already. Oh, but look there’s two new ones coming that I can invest in.”

Comments by Larry, one of the lay committee chairs:

“I am very positive about the brilliant young minds that are traveling and pass through here for a period of two years. And now I’m just, I can’t wait to meet the next batch, you know, because I have an expectation that they’re going to bring something to us that we needed to hear about.”

Janice made a similar claim regarding expectation of what the residents will bring. “And two brilliant ones show up and we get to anticipate. It’s now like Christmas again, we get to anticipate who they’re going to be. What they’re going to bring and how they’re going to make us better.”

Keeps Members, Staff, and Congregation Alive Not Stagnant

The program administrator recognized that both the residents and the church benefits from this teaching relationship. Furthermore, the regularity of two new residents entering each year warded off stagnation.

“I think there’s just a byproduct that the church gets; I think that’s kept us, I don’t want to say alive but I think it’s kept us going because again every year you get

two new people that bring questions and bring new energy and bring new ideas and thoughts and their background so all that we want them to learn is the Wilshire way, we learn things from them as well. We don't really get a chance to get too stagnant, I guess. . . . I think it's going back to being stagnant. . . . if you have two new people every year, so especially like Sunday school, we're not going to keep doing the same thing, you're not going to have the same teachers because you get these new residents in. There's always some new blood coming through that just kind of keeps you a little more awake, I think."

Paul expressed how the residency keeps him alive.

"I mean I think if you wanted to know my overall thing, it's, the residency program is what keeps me alive here. That's where I find more energy in that than most anything I do. Their enthusiasm rubs off on you huge, their energy energizes you. Their creativity, intuition, entrepreneurship is very helpful to keep somebody who's been doing this for a long time energized, activated and feeling like there's still more ministry left to do. . . . And certainly working with residents keeps you energized, activated, open to new ideas in a way, I think, right down to George. I think that as a senior pastor he too feeds off of that. That even though he has a very clear concept of how things should be, which is certainly true, it also broadens him. I mean it keeps him alive and active and from not feeling stagnant. I think that's why George has got such an energy and a passion for the program. I think he too pulls energy for himself out of it as well as puts energy into it."

Mark used the metaphor of "new water into our pond" when speaking about the positive impact of the residents warding off stagnation. The environment is a healthy

balance of challenge and stability as the idealism of the young residents encounters the stability of the institution.

“ . . . there’s constant influx of new water into our pond here so that we’re not stagnant because you’ve got these new ideas coming in through the residents who often are idealistic and usually are bold and will come in and challenge conventional thought, and on the most unusual things. It’s not on theology. It’s usually on praxis. . . . the idealism that comes with being a young minister really helps all of us be challenged and I like the challenge. But, also, in a secure enough place to say, ‘OK, I’ll listen to your idea and I’ll listen to your challenge but I don’t have to react to it.’ I think most of us are in that way so there’s a healthy give and take to it.”

Mark added later,

“Creative energy is the number one thing, just that inflow of new ideas and just enthusiasm. It helps to have young ministers around; the zest for living, a zest for ministry. That is a constant electrical charge to the system, so that’s very positive.”

The flow of the residents brought energy into the congregation in ways that helped to keep it youthful in vitality and from becoming stayed in its ways of doing things. One church leader said,

“ . . . we may not be as young as some other churches but each time a new set of residents comes in it just seems like you know it kind of energizes people, as far as oh what are they going to do, what are they like, ‘I wonder what kind of preacher they are, you know what type of Bible study leader are they, are they

personable?’ All those type of things. . . . I think it shows a new perspective, I think it keeps us a little bit younger. . . .Because they’ll come in and do things a little bit differently or have some different ideas, and it’s nice to see that rather than getting stuck in a rut and it’s just always this way.”

Alan also acknowledged that the residents open up an awareness of creativity and variety within a stable church organization.

“I mean we’re very, very, very entrenched, as far as the traditional worship format that we use, but the Sunday evening vespers is a time to be maybe a little more creative and a little bit less traditional. I don’t think you’re going to see the electric keyboards and the electric guitars, that type of thing, here at Wilshire, that’s just kind of the choice that we’ve made. But there are ways to be creative and do things a little bit differently. And I think the residents have had a lot to do with that.”

Opportunities for Learning and Discovery Applied to Whole Congregation

Robert, a lay mentoring chair, when in the role of giving feedback to the new resident, discovered the value of providing lay feedback to the existing staff. By having this new individual in the system, a discovery occurred that can be applied to the ongoing staff in the church.

“I’ve learned that lay feedback is just as important to a senior pastor here as it is to a young person who’s getting up to perhaps preach in front of a congregation for the first time. I’ve learned that. Not necessarily to keep my counsel but to be willing to say hey here’s what I think, here’s my opinion on this, whether you agree or not, this is my opinion. And I found that most of that time those opinions

are valued, they may not be agreed with but they're valued. That's been one thing that's been on a personal level."

Here another lay mentoring chair, Larry, recognized that by seeing the ministry demands in a close way and through the eyes of this new resident, he acknowledged that his experience with the resident revealed a connection of his own work and family demands with that of the staff which had not previously occurred to him.

"I mean, I have a job, I work all day. I have kids at home, I'm busy at night. So there's not often a lot of time to be empathetic with somebody else's work load. But Bill helped to expose us to that."

The exposure to the views, insights, and learning of a younger generation served to broaden his horizons in ways that were not possible with the existing staff.

"By listening to young voices fresh out of school from another generation, but just as committed to follow Jesus as the rest of us think we are, we're going to be exposed to hear some things that we wouldn't otherwise hear. We're going to hear from 25-year-olds some things that our 55-year-old pastor won't share with us because it doesn't occur to him. So there's just the benefit of broadening our horizons."

Alan also mentioned the positive impact of the newer generation that brought different perspectives. "And it's you know just seeing a different person, different style I think it makes you a little bit reflective, as far as what the program does. And I think that's important."

The residents were identified as a continual resource that provides depth and challenge to their overall adult Sunday school experience, as reflected by Dennis.

“It’s really like we got of a stratum there, just really bright, young thinkers that we can plug in to from a Sunday school level that is just a very good resource. I think it has some impact on a number of classes. Some of our older classes they’ll bring them in and can kind of challenge their thinking, and all of that. . . . This is just kind of another layer that having the resource of those four people all the time to pull from has been really good and it has made a pretty significant change and added you know some depth in a lot of ways to your Sunday school experience.”

Being fresh out from seminary these residents have been exposed to some of the latest theological teachings and methods. As they take their roles in teaching and leading with the congregation these new perspectives aid the congregation and members in their learning. The associate pastor stated,

“The residents often, in the Sunday school teaching, and the Wednesday Bible study teaching are able to bring fresh perspectives in because they’re fresh out of seminary where they’ve looked at things in a different light that really advances the theological inquiry and the congregation keeps folks from being stayed in their ways, so that’s a real plus,”

Though the residents are beginning clergy, some had experience in traditions and churches that are non-Baptist. They will introduce new ideas and concepts to the congregation out of these traditions and experiences in ways that generate learning for the congregation. Shelton shared his experience,

“I am a Baptist by heritage upbringing but took a walk down some other paths before coming here. I had worked in an Anglican church and a Presbyterian

church most recently before coming back to a Baptist setting and this is also my first CBF Baptist setting. So I came here on the one hand a blank slate; on the other hand I had all these what were very positive experiences in other traditions. So, I have been steeped in some other ways of being in church and will rattle off things in a lesson that people go, whoa, we've never heard that before. . . . So, that's been sort of fun, and I've been told, because some of the things have, some of my way hasn't been well received all the time. But it also has generated some discussion of, 'This is interesting.' So, you never know, you never know what seeds you plant in ministry and what seeds have been planted in you."

Some of the influence of the residents upon the congregation was indirect. Cindy, an alumni resident gave reflection on how the church and pastor were dealing with the controversial issue of homosexuality. The mentoring relationship of the pastor and residents may also impact the congregation in positive ways.

"I think they really value our voices even to the point of to talk about homosexuality, for example. One, a big conflict was there when I was there that was a rift between the youth and youth parents because there's some growing feelings about where does the church stand on this issue. I think it's really interesting because George personally really struggled to keep everyone in dialogue and not to get angry and leave because some people wanted to leave. In fact, some people did leave and he tried to be a good mediator but he bore the burden of a lot of that and yet with the residents, he always gets energy from the residents and making everything a teachable moment. So he would come to us and be like, 'Well this is what's going on and this is really hard for me and this is

...’ He would seem very, like he was really struggling and so we got to learn from that. And I think in part he, he listened to us; so what we said influenced him which then influenced the congregation.”

What are the Changes that Occur in the Organization?

The fourth research question was directed to find out what changes, if any, occurred in the organization. Evidence of changes for the congregation as result of involvement in the inductive education of young clergy appears most strongly in the understanding, expression, and action of the church as a teaching congregation. As a clear identity has developed, so too has ownership by the congregation of the presence and function of the residency program. Other changes that arise can be described as relating to the role, function, and behavior among individuals within the congregation. Direct questions seeking what was observed and believed to be changes in the congregation were asked. Other questions proved informative. One question focused on asking what advice interviewees would give individuals from other churches who might inquire about what is involved in getting started with a residency program in their own church. Another question that illuminated their understanding of the identity and expressions of ownership related to the likeliness that the residency would continue if and when the pastor would no longer be on staff.

Table 8
What are the Changes that Occur in the Organization Findings

Research Question	Finding from Data	Sub-Category of Findings
What are the Changes that Occur in the Organization?	Development of New Identity	<ul style="list-style-type: none"> • Identity Emerges out of Vision • Language an Initial Indicator • Functional Ownership

Research Question	Finding from Data	Sub-Category of Findings
		through Behavior <ul style="list-style-type: none"> • A Lasting Identity
	Essential Signs of Change	<ul style="list-style-type: none"> • Behavioral Changes • View of Ministry Broadens • Changes are Beneficial

Development of New Identity

Though the church made a commitment to begin teaching young clergy through their pastoral program, there did not exist at the beginning an articulated identity as a teaching congregation. Nonetheless, as the residency program began, a culture of being a teaching congregation began to take seed through the involvement of laity, the activities of mentoring these residents, and the teaching and learning relationships through members, staff and groups within the church.

Identity Emerges out of Vision

The pastor spoke to the beginning stage, before an identity had taken shape. He had been asked what his vision was for this congregation at the beginning of the residency.

“I simply had no reference point from which to make a guess about what would happen in our congregation. Initially I would say the program lived a little bit on the fringes of who we were, everything else went on as usual, and we just added these residents who started functioning.”

However, a culture of becoming a teaching congregation grew rapidly from the beginning. Laity were involved from the beginning. This contributing factor in the

learning for the congregation gave direction toward development of a congregational identity of a teaching congregation. The pastor continued,

“But right at the beginning we began forming lay committees, giving them responsibilities to mentor from the pew, not just from the staff. And they fell in love with these kids, you know, and began to take this very seriously. So a culture of becoming a teaching congregation grew quite rapidly because there was a good bit of ownership right at the beginning with key people in our church who were really for these young ministers.”

After a decade of teaching and training clergy through the residency, the pastor made the claim that the church has clarity of identity as a teaching congregation. He then went on to state his vision of what the next generation of this program will bring to the congregation.

“And of course now over a decade we’ve had probably 200 people involved somehow in this whole process and they represent a real core group of people who believe in this work, clearly the church does not want to see this go away. It is now a part of the identity of the church, that it is a teaching congregation. But the next generation of what that means is just now coming into view, and has not taken deep root yet. The next generation of that I believe is where the whole church’s culture becomes that of a learning community where this notion of mentoring becomes the normal way of doing church for Sunday school teachers, for directors, for deacon officers, for committee chairs, where they have their successors working alongside them and they help them learn what they do well and then they essentially find their replacement, or they train the next person to

start a new class or some such thing as that. So that there's this constant mentoring mentality of the teaching congregation going on . . . I'll know that it is deeply rooted when I see that become widespread. I see it ad hoc now happening but it is not yet widespread, it hasn't drilled down deep enough. In my judgment that's the next move."

Language an Initial Indicator

Referring to this stated identity as a change, Robert, a lay committee chair, distinguished it from earlier descriptions of Wilshire as a missional church.

"But I think more people would think of Wilshire as not only a missional church but as a teaching congregation, and I think that's the biggest change. And I think the members think of themselves as a teaching congregation, as being part of a teaching congregation. So that's probably the biggest thing. We haven't lessened our focus on missions but we have increased our focus on teaching and preparing."

Mark, the associate pastor, credited the residency with providing a clear identity to the church as a teaching congregation. It is an identity that translates into other areas of the church. He provided an example of this.

"I think the residency has brought to our congregation a really clear sense of identity. The notion of being a teaching congregation has caught on and it's a label we like and it carries over into other areas. Some of the other programs and things we do, people can make the jump to say, 'OK, because we're a teaching congregation now, we can do this or that.' and so there are ancillary benefits just simply by the mindset of this. So, for 3 years now, we've had a social work intern

from Baylor School of Social Work that's been under the mantra of, 'Yeah, we're a teaching congregation, we ought to be doing that.'"

Cindy, an alumni resident, affirmed that the church voices its identity as a teaching congregation. She also referenced the time when she began the residency program. Members expressed affirmation of the residency in actions and voice.

"And in addition to that, they, they use that term, teaching congregation, primarily around the residency saying, you know, we're a teaching congregation. People in the church are very invested in the residents. I could pick that up in the first week just from they did a pounding for the residents in one of the Sunday school classes. We brought home gift certificates, toilet paper, and cleaning supplies. It's like, 'Whoa, these people are totally invested.' I heard it said multiple times while I was there, 'The most wonderful thing about our church is the residency; we get to be a part of this teaching congregation.'"

Doug, a ministry staff member, said of the laity in the church that often they use the term "teaching congregation." He described that people feel to be part of that identity. "They feel like they are part of the teaching that is going on by the lay mentoring committee involvement. We have in the past had host families for residents. So there have been some very specific ways."

Though the congregation had a strong sense of identity as a teaching congregation, it did not necessarily mean that everyone was fully knowledgeable of the inner workings of the residency program. The members certainly had been drawn to the residents "as beloved people," as Mark described. Yet, while the congregation was receptive to the residents and knew what to expect from them and the experience with

them, many people in the congregation did not know the finer details of what occurred. He distinguished between the average member and those laity who are deeply involved and engaged with the program.

“Now, as far as the inner workings . . . most people in the congregation have no idea what those are and a lot of folks still call the residents interns. But, the average person in the congregation really does not understand, has no need or desire to understand the inner workings of the program and the curriculum that goes with it. Now, there are lay people who intersect with that regularly and they do get it.”

He also emphasized the importance of language. Acknowledging that even though they are nearly 10 years into this program Mark said some members still call them interns. Language may be the last to change as people and organizations take on new identity. “Even now, that is the most aggravating thing you can say to a resident is to call them an intern. It’s that little bit of language; it’s so much more than an internship.”

Functional Ownership through Behavior

Though some were not able to articulate the finer details of the mechanics of the program, still calling the residents interns, there remained a broad recognition of the identity as a teaching congregation and ownership of it within the church. The residency program has been well received and appreciated across generational lines. Dennis, a church leader, indicated that the congregation across its generational groups has “embraced” the program.

“And I really perceive that it’s not just the younger group that appreciates it, it is our median and our older. They make a deliberate attempt to connect at all levels

obviously, but it really has been embraced up and down the age groups pretty well.”

Being a teaching congregation is a welcomed identity by the congregation. This identity and way of being church is also deeply appreciated and valued. Janice, a church member, reported on comments she had heard from long-time members of the importance of this residency to the church. She affirmed this significance from her vantage point of near 40 years of membership.

“Long time members that had been here all their lives were saying, ‘This is the most important program I remember ever being involved in, in all these years.’ And I’ve been here 40 years, about, and it’s definitely that significant for me as well. And I’ve not been a fringe member. I’ve taught Sunday school at several age levels and chaired committees and it, it is the most impactful.”

More than a stated identity, there was functional ownership by the members of the church as a teaching congregation. Robert claimed that the residency program had a tremendous impact on the congregation. The church had become unified in its identity and ownership of the residency.

"I think it has had a tremendous impact on the congregation in that people are involved, aware, and interested and think of themselves as being a part of something important. And it’s not something that all of those people did, or the deacons did, or that was a real nice project that this committee did. It’s something that we did. And I think that it’s helped bring everyone together in a common kind of cause. You do have committees that go off and do their thing, and you’ve

got deacons that go off and do their thing, but this has been a congregation wide thing, and everybody feels like they've had a really important part in it."

Larry, another lay committee chair, pointed to the widespread ownership in the congregation of having responsibility in shaping and teaching these young clergy.

"I'm noticing that the business of helping young folks to mature into their adult roles is not delegated only to the support group that's appointed for those residents. Each Sunday, for instance, that one of those residences preaches, I see people gathered around that resident afterward providing feedback. I don't know how many people it is, but there must be 50 people who think that they're on that committee who really aren't on that committee. And I don't know how the resident views that, but what I see mostly seems to be positive."

Larry had more to add about functional ownership he had observed in the changes of behavior in the people. He described their interest and activity as a teaching congregation as creating a change within the atmosphere and character of the church. He claimed that the church is less like an institution, and more like a family.

"But what I see instead is so many different people who were not called to some role in the *Pathways to Ministry* program yet wanting to be involved in the lives of the residents who pass through. . . . I hear stories from time to time about families who will invite one of the residents home for dinner or will do something together with one of the residents, and the family doing this is not somebody that's on that committee. I don't know if that's a big deal or not, but that impresses me, that folks would take the initiative to say, 'OK, you're not going to be part of my community in 2 years but you're part of it now, so let's get to know each other.' It

acts, this place sometimes acts a lot more like a family than it does an institution, and I guess that's one of the examples that I see.”

In addition to a relational and familial atmosphere, the congregation had become a place that fostered an attitude of encouraging others and calling out their gifts and abilities. Doug expressed this as a culture of call. This is an environment where individuals would identify and call out the talents, skills, and abilities seen in others in ways that encouraged them to lead and serve.

“My sense is that what has become embedded in the church system is an affirmation that we now have what we call a ‘Culture of Call’. . . . it is a phrase that gets used that we're either a ‘teaching congregation’ or that they're here as a ‘Culture of Call.’ That's another way that we describe that.”

He continued with an example,

“. . . if a student chose gifts, we're encouraged, I'm encouraged, our Student Minister is encouraged to say to that student, ‘I see in you some very special gifts and I don't know if you've ever thought about this, but have you ever thought about being a Minister of Music or about being a Student Minister or about being a Pastor?’”

A Lasting Identity

The residency program has come to define the congregation as a teaching congregation. The identity of being a teaching congregation has spread into other areas and programs of the church, and among all the age groups. Furthermore, as an embraced and ingrained identifying mark of the congregation, it is “not optional anymore,” according to Janice.

“... the one thing this church agrees on, probably more than anything else is that this is a program that is not optional anymore. It defines us as a church and the teaching part is important to us all. It is in our infant and toddlers class and our youth and the, *YourCall* part of the *Pathways to Ministry* and the mentoring that goes on with seminary students, George’s Preachers Practicums, it’s become who we know we are.”

Dennis has been a member of the congregation for over 30 years. He echoed the sentiment of a lasting nature the residency has become.

“It’s just really hard to imagine that program, this program not being a part of our lives, not being a part of our church life. . . . But it’s hard to imagine if we were lose the Lilly funding suddenly, if we had to scale back or something I guess we might but ending the program is just kind of hard to conceive now. It’s been that engrained in our church.”

The residency is ingrained and has had the benefit of a strong and visionary leader. Grant funding has been in place to generate and maintain this residency for its first decade. In seeking to surface the level of ownership the church has in the program and its prospects for continuation for another decade, Paul, one of the ministry staff, was asked if the residency program will survive without the pastor.

“I don’t think the sense of call here, you’d have to work pretty hard to stomp it out of people. You’d have to really give them something to fix on that could take the place of that in order to get them off of it. I think they’d push whoever they brought here into at least, to start with . . . I don’t think they’d hire somebody who couldn’t put some commitment to it, if they weren’t committed to this . . . I think

it's in too many people's heads here that this is who we are for it not to be a front piece of recruiting. And if you're not into what we're into, then find another game."

Alan, a church leader, was also asked how the program will continue if the pastor were to leave. His response indicates that the congregation has a strong commitment to the residency.

"I think it will have somewhat of an impact but I think that the congregation's committed enough to it that we'll figure out a way to continue it, and especially with this endowment, hoping that we can get that to a number where it is self-sufficient then I don't think it will go away."

Evidential Signs of Change

Various questions were targeted to surface noticeable changes in the congregation during this period of running the residency program. One question was a question of comparison. The common phrase, "that was then, this is now," was applied to Wilshire and the residency program. Interviewees were presented with the question of how they would answer, Wilshire "then," before residency, and Wilshire "now" having been engaged in this inductive phase of clergy education. Another question depicted a hypothetical situation in which the interviewee would receive a call from someone in another church inquiring about the possibility of beginning a residency program. The question posed asked what advice would the interviewee give. Informative responses in conversation and to other questions provided insights into observable behavioral changes, broadened views of ministry, and affirmation that changes are beneficial.

Behavioral Changes

The pastor described a change in behavior when he would be absent from the pulpit and the residents would have a turn at preaching.

“When I would not teach or preach and they would step in because they needed opportunity to do that something interesting happened there. I realized that the church was changing in this direction when I realized that there was very little griping about my not being in the pulpit, or my not teaching on a Wednesday, because when they would preach or teach people would turn out and they would be eager to see what they had, how they were growing, give them feedback, encourage them. And, I’m thinking this is amazing because all my ministry when I’d be out of the pulpit there’d be a kind of grouching about the substitutes, and people would head from Sunday school straight to the cafeteria, and there’d be a lot missing. I mean I used to think I could bring Billy Graham in here and they’d say well the pastor’s not preaching this week, and it’s really not because it’s George but it’s just in every church I think there is this sense of there’s no great stake in my being there for a guest preacher. I don’t know whether that means that people think well it’s important for me to be there when the pastor’s there so that he or she sees me in the pew, and that relationship is solid – I don’t know what that means exactly. But I looked out on the congregation and realized people were staying, they were here.”

The pastor acknowledged a personal change. He expressed a change in his understanding of the execution of his role on staff.

“I think I used to think of team as I’m the quarterback and you’re the rest of the players, I call the plays and you execute them. But you know I don’t really look at it that way anymore. I think a lot of what I see as my responsibility now is to help everybody else be successful in their work. I do have a way of setting a kind of vision and articulating who we are in a way that’s unique to my role. But one of the things I’ve done over time is to relinquish the day-to-day management of the staff and the operation . . . If we were to make the distinction between leadership and management probably more of my time is in leadership and more of his [the associate pastor’s] time is in management.”

Doug, one of the ministry staff, spoke to a personal change. Prior to his involvement and experience with the residency program he would rarely have intentional conversation with high school students about considering a career as clergy in the congregation. As result of his time spent at Wilshire in this environment and with this program, he had intentional conversations with young people in the church about serving in a congregation.

“And I’m going to be honest with you and say, before I came here, I don’t think I did a very good job of that. And I have had two of those conversations just this spring with two seniors in high school who are gifted musicians.”

Larry, a lay committee chair, spoke to the value and pride of having made contribution to future generations through this residency program. In reply to a follow up question asking if the church had begun to think beyond itself, and to look outside of its own walls he responded,

“I think the way we bring in new staff to do mission work that lands people outside our walls is also a factor. It's probably, how would you say it, maybe a synchronicity among the different ministries, *Pathways to Ministry* being one of them, to cause us to sort of take the curtains off the windows and look outside the walls of our own church a bit more.”

View of Ministry Broadens

The role of being a teaching congregation developed a congregation of ministers, which has been a shift according to the pastor. One shift is from the perspective of the role of the staff. The staff has shifted from being a program provider to becoming relational ministers. He described it as a “ripple effect” of the residency program.

“I think we were a little bit more of a direct service provider 10 years ago, and now we are more of a congregation of ministers. I think our staff provided religious and spiritual programming for the congregation. We were delegated the job of being the ministers, I think that that has changed. I don't think it was 180 degrees. I think that the concept of the church being a priesthood of all believers and all of that was something we all got in theory but in practice I think we were still operating with this sort of giving and receiving model, where the staff gave and the congregation received, which gets some times, in some churches, dangerously into a kind of consumer approach to things. . . . That's another iteration of how the church has changed, and I believe it's changed in part because of the ripple effect of this notion of a teaching congregation, where everyone's a minister, and we understand this is our work to do.”

Paul, another ministry staff, observed that the congregation had expanded its understanding of how it views ministry. Ministry is not reserved for a few people, nor compartmentalized.

“Well, one of the things that I think is quite remarkable about this church is the breadth of the culture here of considering life’s, everyone’s life in ministry. I mean I think that’s one of the things that from the children’s programs, the *YourCall* programs and things that they effectively run in terms of being, learning how to be a Christian in everything that you do and seeing that as a ministry, I think that’s part of what the congregation has really grown in.”

The pastor observed a significant change in individuals giving consideration to enter ministry as a career.

“In this 10 year period one of the most dramatic changes that’s happened in the congregation that I haven’t really mentioned yet is the growth of people who want to be ministers per se, who want to improve their care-giving skills.”

Larry, a lay committee chair, affirmed that ministry was being done within the church.

“I think that the congregation will see a lot of hands-on ministry coming from the residents as well as from the staff. The residents can't really go out and do the ministry without the guidance of the staff in many cases, so you wind up seeing more and more ministry done, and I'm talking about local ministry within the congregation, for instance.”

Larry attributed the change in the ministry actions that lay people are more involved as being related to the residency program. His comments also reflected that members spoke about and talked about this with one another.

“I am told by people who have been here a lot longer than I have been that our lay ministry, ministries done by people who are not staff ministers, has increased dramatically over, say, the last decade. I'm guessing that the residence program is a portion of that. . . . but what I see is people responding during the week to things they hear about either on Sunday or via an email during the week. We don't always have to sign up a group to follow through on some member's needs. Sometimes folks just pick it up and go with it. And, you know, I realize that sounds like a very simple thing, but I haven't seen that happen many places.”

An openness to be engaged in ministry has evolved during the years of the residency program. The pastor affirmed that the members have become more involved in ministry. His description revealed what occurs and how members took more initiative for responding to needs that arise.

“So what happens is you develop this sort of roster of all these people who have these different [gifts]; they'll just do this one thing, but then what you do is you find this person who is in crisis of some sort and you begin to pick the necessary people, assign one to be the leader of the care group and this person who couldn't do it for himself suddenly has a whole team of people that has helped to organize this person's life.”

Paul was asked what advice he would give to another church considering this kind of program. His response reflected not only the benefits he saw from his experience, but also a shift in the understanding of the role of the church.

“And I think a congregation will, through that experience, grow to having a larger vision of itself. I think those are the things that I would talk to if somebody called me and asked me, saying, ‘This is not the easy program that’s going to take nothing out of you, this is a program that’s going to put a lot into you. You’re going to gain huge and those gains are going to be well worth the energy and effort it’s going to take to make it work. And if you do it well you’re going to think it’s the greatest thing you’ve ever done, and if you don’t do it well you’ll be done with it in 2 years and off to another project that suits you better.’ I don’t know that it’s for every church.”

In giving advice to another congregation there is revealed in these two comments the perception that change occurs in the congregation. These are not specific changes described, but expectations that change will occur, and a reorientation of understanding of role within the church. Doug, a ministry staff, stated, “One way that I think it will affect you is it will broaden your horizons about what you’re up to as a local congregation.” Dennis, a church leader made the following comment.

“Oh boy I would have to ask them about 20 questions about their church first, because it’s kind of where are you coming from. Because if you believe that your church is a place for the members to just come and be fed and to socialize with other Christians and so forth, and then go away you’re going to be disrupted from that pattern. It’s going to take you in a different direction, better I think, but be

prepared for some real changes; it's going to broaden your thinking. To answer the question is it worth it, yeah, but it is a bit of a sacrifice, in terms of changing maybe the way they view what the church is about. . . . But you know, I would just say to somebody, 'Go into it with your eyes open because it will change who you are as a church probably, kind of depending on where you're coming from.'"

Changes are Beneficial

Alan, a church leader, shared these benefits,

"It's been such a plus to the congregation . . . you can get to know [residents] individually and each one you know has their own personality, own characteristics. I think it's really been good; I think it's been good for the church. . . . I think, too, it's freed up the staff to pay a little more attention to some things at times that they weren't able to before, in that they may have some meetings or administrative type things they really need to get to but they also needed to be visiting these people in the hospital or home visits. You just have more feet on the ground if you will, as far as being able to do that."

Dennis recognized that the congregation learned in this process. He referenced the adage that a volunteer often gains more than the one helped to compare that with the congregation's experience as a teacher that learns through the process.

"I think the congregation's going to learn that, and I think an attitude of willingness to try to help out, and how can I support them, how can I help them, and in the process it's kind of like volunteering for something. It's going to help somebody but when the activity is over usually you get more out of it than the

person you think you're helping. I think kind of the same thing with the congregation."

Later in the conversation Dennis returned to this recognition of the reciprocity of learning as beneficial for the congregation.

"Anyway it's been a very rich experience and by that some of it made you question or challenge sometimes your own sort of assumptions about how this role of becoming a pastor takes place and all of that. It's just been a whole new dimension to our church, it really has. I know we're supposed to be the ones kind of fostering and teaching them but I really do think our residents do as much to affect the life of our church as we do them, and maybe more, and whether they're aware of that or not I don't know. It truly has been something that they have had every bit as much an impact on us."

Summary

The investment and participation in the inductive phase of clergy education at Wilshire Baptist Church through their *Pathways to Ministry* program is soon to enter a second decade. What began as a desire and commitment to mentor young clergy as they made the transition from their pre-service education to actual practice grew to become an expansive and deeply involved system of teaching and learning. As teachers, staff and laity learn. New perspectives on ministry as well as the realities of challenges in pastoral ministry also led to recognition of the value of collaboration in ministry and the reciprocity of learning. Learning is fostered by strong leadership that creates space and opportunities for others to share in leadership. Learning also thrives as individuals and groups engage in reflection of their practice and experiences. Conflicts and mistakes do

occur, but have become opportunities for evaluation and development of the program. The recurring presence of new individuals breeds vitality, creativity, and discovery for staff, laity, and the congregation. Individuals experience change in their perspectives of ministry and their own assumptions. However, the congregational change that is most identifiable is the clarity of identity as a teaching congregation. The residency program has become a fully integrated function of teaching and learning within the congregation system at Wilshire Baptist Church.

CHAPTER 6

SUMMARY, CONCLUSIONS, AND IMPLICATIONS

The purpose of this study is to ascertain how teaching congregations learn in the process of facilitating the training and development of beginning clergy in the inductive phase of clergy education. Four primary research questions guiding this study are as follows: (1) What is the learning that the congregation does in the process? (2) How does the congregation learn? (3) What factors facilitate or impede the learning of the congregation? (4) What changes in structure, roles, and organization, if any, occur? This chapter draws from the findings presented previously from the research of the *Pathways to Ministry* pastoral residency program of Wilshire Baptist Church in Dallas, Texas. A summary of these findings will be followed by implications for theory and five major conclusions. These conclusions will be discussed in further detail and implications for practice and policy will be presented. Finally, implications and recommendations for future research will be explored.

Summary of Findings

This is a qualitative research study employing a case study approach using the exemplary case of a congregation engaged in the inductive phase of clergy education. Data was collected through on-site interviews with five staff members, five laity in the congregation, and two residents. An analysis process of “consolidating, reducing, and interpreting” the collected and transcribed data was followed in order to make meaning of what these individuals said (Merriam, 2009, p. 176). Through an inductive and deductive

process, themes were generated, organized, and interpreted (Ruona, 2005). Recognized at the outset of this study was a lack of knowledge about how those congregations engaged in the inductive phase of clergy education learn and about the facilitating and limiting factors in this teaching and learning relationship. Fleischer's (2006) study was cited at the beginning of this study with the assumption that a congregation and its members that engaged in the teaching of clergy would experience personal learning and shared team learning. A foundational base of knowledge has resulted from this study about what learning occurs, how this learning occurs, and the contributing factors of this learning process. Findings have been grouped within the four major research areas: what is learned, how the learning occurs, what facilitates the learning, and what, if any, changes emerge within the organization.

Learning occurred at the personal level. When the question was framed in terms of the experience of the interviewees, individuals offered responses reflecting what they learned personally and learned about ministry, as well as their perspective on what the congregation learned. The laity expressed discovery and affirmation of ministers being human and came to recognize the particular distinctions and challenges of pastoral ministry work in congregations. Laity and clergy both referenced a gain in appreciation for ministry as a collaborative engagement. The collaborative experience included work relationships among the clergy, and those relationships between clergy and laity. These individuals and the church have developed a strong and deep appreciation in their role of teaching and mentoring these beginning clergy. They identify their role as a teaching congregation as valuable for them individually and as a congregation.

As a teaching congregation, staff and laity are involved in teaching and mentoring roles. These individuals, and the groups in which they are involved, encourage reflection by and with the residents. These settings generate reflection activity for staff and laity as well. Staff reflect about their own work in ways that clarify their roles and identity. Laity reflections promote personal discovery. Staff and laity share insights about the significant role of active leadership and involvement of the senior pastor in the growth and development of *Pathways to Ministry*. Organizationally, there are some examples of single loop and double loop learning.

Interviewees' responses about their involvement in the residency program, an inductive phase of clergy education, contained information on what factors led to their learning and discovery. The leadership of the *Pathways to Ministry* program is intentional in involving laity in multiple areas of the residency, which enables opportunities for learning. There is a culture within the congregation for creating the space for both residents and laity to step in and take on leadership opportunities. Surprises, mistakes, and conflicts do occur within the context of ministry and the residency program. Described in the findings as contextual jolts, these occurrences stimulate learning for both individuals and the organization. Each year two new individuals are introduced and integrated into the congregation. Their interaction and leadership in one-on-one relationships, in group settings, and with the congregation as a whole brings an infusion of new ideas and perspectives, discouraging stagnation and stimulating creativity and vitality.

Changes emerge in the findings relating to the role, function, and behavior among individuals within the congregation. The perspective and understanding of ministry

broadens for staff and laity. The data also points to a growing ownership within the congregation as a teaching congregation that yields a clearer articulation of being a teaching congregation. Coupled with the growth in ownership and clarity of being in a teaching role, laity and staff acknowledge the mutuality of benefits for residents and the congregation.

Implications for Theory

Individuals carry with them a portrait of the organization, and through these portraits “we can detect changes in the organization’s mental models, shared values, and memory” (Marsick & Watkins, 2003, p. 136). The learning organization model of Watkins and Marsick (1993, 1996) provided the lens for this study of the teaching congregation. The seven action imperatives of this model are identified as: 1) create continuous learning opportunities, 2) promote inquiry and dialogue, 3) encourage collaboration and team learning, 4) create systems to capture and share learning, 5) empower people toward a collective vision, 6) connect the organization to its environment, and 7) provide strategic leadership for learning (Marsick & Watkins, 1999). Four of these are viewed as individual and group learning activities: “creating continuous learning opportunities, promoting inquiry and dialogue, encouraging collaboration and team learning, and empowering people toward a collective vision” (Watkins, Milton, & Kurz, 2009, p. 68). Watkins, Milton, and Kurz (2009) found that these “had indirect but significant effect on organizational outcomes” (p. 68). The remaining three are organizational level variables, and are described to serve “as mediators of the relationship between team and individual learning activities and organizational outcomes” (Watkins, Milton, & Kurz, 2009, p. 68).

The findings of this study indicate the development and change in this teaching congregation align with the action imperatives of a learning organization. The staff and laity are presented with continuous learning opportunities. The intentional involvement of laity in multiple aspects of the program and provisions that allowed for laity and residents to lead has generated opportunities for learning. Lay mentoring committees are comprised of people from various age groups, background and church experience. The entrance of two new residents each year has brought new ideas, teaching, preaching and programs. Engagement in the residency program has generated dialogue and inquiry within one-on-one relationships, among groups, and in the reflection on activities by those involved. These opportunities for reflection promoted dialogue and talk that led to understanding, personal discovery, and contributed to the shift in the congregation's functional identity.

Collaboration and team learning are encouraged through the pairing of residents with existing staff for hospital visitation and the lay mentoring committee which places laity and the residents together. These experiences, conversations, and meetings promoted sharing across boundaries. Findings indicate this has strengthened the collaboration for those involved, as well as modeled the value of collaborating in ministry for the congregation. Laity and staff articulated recognition of this new-found collaboration. They also spoke about their role as a teaching congregation and desire to continue as one, indicating a shared collective vision of their identity. The pastor's vision and engaged leadership served to influence and model for others ownership of this identity.

A *Pathways to Ministry* committee functioned initially as an ad hoc group for guidance and support. Later this committee was formally established to strengthen and maintain the residency and build upon the collective knowledge generated. The process of generating annual reports to the funding agency has served to be another point where learning is captured. By graduating and sending out two residents each year to serve in congregations Wilshire has an ongoing connection to the larger environment of congregational life. The congregation acknowledged their efforts as making a contribution to the future of clergy leadership and congregational ministry beyond their local reach. The residency, as a phase in the process of clergy education, has connected this teaching congregation, as an organization, to the environment of seminary education, and the training of ministers.

The strategic leadership of the pastor was instrumental in the initiation of the residency program. Actively engaged in the residency, he is a mentor to the residents and makes space for them to preach in Sunday morning services. His strategy has extended to involve laity throughout the program and to allow others on staff to take leadership roles. He used the term, “strategically defaulting” to identify his leadership approach. He described this as “defaulting in place” explaining that it “is sometimes a way to give people the chance to thrive around you and not always have to be in the middle of it.” His visibility modeled both participation in and value of the residency.

Organizational outcomes include a broadened understanding of ministry and shift in the congregation toward a collaborative engagement in ministry. Other organizational outcomes noted are widespread reflection on ministry practice, vocational renewal among

the staff, and vitality in the congregation as a whole. Five conclusions can be drawn from this study about the teaching congregation as a learning organization.

Conclusions

Conclusion 1: Reciprocity of learning in the teaching congregation provides multiple system benefits and makes ministry a collaborative engagement.

Considering organizations through the lens of the learning organization requires recognizing the organization as a context for learning (Watkins, 2006). Individuals in the organization, with their own developed and stored meaning structures, are “capable of creating new meaning from their interface with their environment and each other” (Dixon, 1994, p. 36). Congregational contexts are a “teaching/learning environment beyond the seminary context” (Wood, 2008, p. 291). Wind and Wood (2008) made reference to the “practice-centered teaching and learning of ministry . . . in the domain of congregational practice” in their report on the transition into ministry education programs sponsored by the Lilly Endowment (p. 33). They reported an initial discovery that the young clergy were not the only ones learning: “the clergy, staff, and congregation members discover just how much they have to teach and learn together” (Wind & Wood, 2008, p. 36). The findings from this study confirm that reciprocity of learning is not merely a by-product of the residency program, but is directly connected to the intentional activity of being a teaching congregation.

The staff and lay leadership of the congregation began the residency program with a desire to provide a context of learning through practice and mentoring. As a result of being engaged with these residents in a mentoring and teaching role, staff and laity not only experienced personal discoveries about ministry, they learned from these residents

as individuals and as a congregation. The teaching and learning relationship became a mutually beneficial engaged relationship involving reciprocity of learning for the residents, laity, and staff. Marsick (2000) indicates that organizational learning is “a dynamic process through which people co-construct knowledge” (p. 19). The dynamic process of pastoral residency within the congregation provided learning within these relationships of mentoring, teaching, and reflection. As coparticipants in the teaching and learning relationship, these individuals share experience as providers of instruction and beneficiaries of the exchange.

The personal learning by the staff and laity included changes in perspectives on gender issues and appreciation of generational differences. As the residents are learning the complexity and demands of ministry, the laity in the lay mentoring committees see firsthand through these residents these very same complexities. Not only do they learn about these realities of ministry, they recognize that existing staff have these same experiences. Laity also recognize the human side of clergy. Furthermore, staff in the role of teaching others about their discipline found a deeper understanding of their work as well as improvement in their skills. The function of being a teaching congregation fosters collaboration among the staff and between staff and laity. As this develops and is exercised it becomes identified as valuable. Watkins and Marsick (1993) emphasize the importance of collaborative work in the learning organization, the “sharing of information across boundaries” (Marsick & Watkins, 1999, p. 14). The boundaries could be described as the laity and clergy boundaries, gender boundaries, generational boundaries, or expert and novice boundaries. The potential results of their collaboration

extend “the organization’s capacity to achieve unified action on common goals” (Watkins & Marsick, 1993, p. 14).

Through the congregation’s experiences of forming, shaping, and receiving from the residents, their commitment to the function of mentoring and providing a context for this inductive phase of clergy education strengthens. Organizational mentoring (Hale, 1996), as distinct from traditional one-to-one mentoring, engages multiple individuals within the organization to serve in a mentoring capacity in their specific areas of expertise. Hale’s conclusions pointed to benefits within the organization that include collaboration, engendered trust, and increase in initiative. At the outset of the study, the pastoral residency approach in the congregation was linked to this concept of organizational mentoring. Mutually beneficial results within the congregation and among the individuals involved included a collaborative experience in ministry and an environment of creativity. Interviewees did not refer specifically to engendered trust; however, their expressed positive experiences and appreciation for others’ roles are indicative of trust in the system.

As this role is exercised, the identity as a teaching congregation becomes more clearly articulated and valued. The value seems to rest in the mutual benefits realized. The relationship provides reciprocity of learning, where the teacher becomes the learner, and the learner becomes the teacher. A recent study on practice nurses who had supervised undergraduate nursing students serving on clinical placement in a general practice setting reported on the relationship of teacher and learning. One theme reported in the findings was described as “reciprocity in learning,” which “represents the reciprocal nature of the learning/teaching relationship between nursing students and the

Practice Nurses that supervise them in the general practice setting” (Halcomb, Peters, & McInnes, 2012, p. 526). Supervising nurses serving as teachers and mentors to nursing students referenced that they also learned in this role. The findings of the present study indicate that the staff and laity are beneficiaries of learning in their roles of mentoring and teaching. Additionally, the pastoral residency program engages an entire congregation in the role of mentoring and teaching. Therefore, reciprocity of learning is acknowledged as a reasonable expectation at the organizational level as well.

The reciprocity of learning throughout the congregation, from individual to organizational levels, fostered a collaborative environment in the primary work of the congregation, which is ministry. As staff and laity engaged in this collaborative ministry, the congregation, organizationally, broadened its view and understanding of ministry. The pastor described this shift as moving from being a service provider to being a congregation of ministers. The notion of being a teaching congregation, according to the pastor, created a ripple effect through the organization to “where everyone’s a minister, and we understand this is our work to do.” The uniqueness of “the dual identity of pastor and pastor-in-training” in pastoral residency, “creates the conditions for a more open-ended encounter between pastor and laity” (Wind & Wood, 2008, p. 32). The typical division of labor between clergy and laity in congregational life is “reframed as a partnership of collaboration and coparticipation in the teaching and learning of ministry” (Wind & Wood, 2008, p. 32). A decade of partnership in the teaching and learning of ministry with pastoral residents has moved beyond the parameters of mentoring clergy whereby ministry as collaborative engagement joins clergy and laity in the whole organization in shared partnership.

Conclusion 2: The teaching congregation as an organization takes on a culture of reflection through individual, group and organizational engagement in ministry practice.

Oak (2006) recognized the residency programs that engage beginning clergy in a first vocational setting as engendering an action-reflection process. The formative and developmental dimensions of learning for these residents are significant. Learning in practice is the foundation premise of an inductive phase of clergy education. Providing these residents with the opportunity to apply their preservice education in a congregational context gives them the chance to learn in a supportive and safe environment that is an operational organization. This immersion in a safe learning environment has been reported as beneficial for these clergy (Oak, 2006; Wood, 2006). The practice provided for these residents generates opportunities for the laity and staff of the teaching congregation to engage in the activity of reflection with the residents. It also generates the opportunity for the laity and staff to engage in reflection on their own practice as a mentor, minister, and church member.

The staff who have continual contact with the residents in formal and informal settings are engaged in processing experiences, giving explanations about the reactions of the congregation, and sharing personal insights about the work of their particular role in the church. These encounters and conversations generate for the staff reflection on their own approach to ministry, and how to best describe and articulate what they do. Staff shared that through this reflection they gained impetus to refine and improve on the work and approach they make to their function and service as ministers. Laity have formal and informal opportunities for interaction with the residents as well. It is evident through the

responses of laity that these interactions and meetings with residents generate personal reflection on their lives, their work, and their role as laity in the church.

Brown and Duguid (1991) write about “the concept of ‘learning-in-working,’” and emphasize that it “best represents the fluid evolution of learning through practice” (p. 41). Individuals in various roles within the congregation are engaged in the work of the congregation and the work of the residency program. That they are learning through this work and practice is evident. The work and practice generate the activity of reflection by those who are serving in the role of teacher. Because the program is built on a reflective model for learning for these residents, the activity of reflection becomes natural for the staff and laity of the congregation, and may also serve to become normative within the environment of the organization as a whole.

Another dimension of learning related to practice is what Schön (1987) calls reflection-on-action and reflection-in-action. Reflection may occur when thinking back in order to discover how one’s “knowledge-in-action may have contributed to an unexpected outcome” (Schön, 1987, p. 26). Such reflection is distinguished from reflection-in-action, because it “has no direct connection to present action” (Schön, 1987, p. 26). In an organic system, the situations of actual practice are not bound by preconceived results based on learned theories. The residents encounter new experiences, as well as experiences differing from expectations based on their academic training. Long (2008) believes there is value in learning good ministry practice by facing the challenge and negotiating this gap between seminary and the practice of ministry. Negotiating the transition allows the tension to shape the pastoral practice of these residents (Long, 2008). In the residency environment this negotiation is not done in

isolation but with support and guidance from staff and laity who participate alongside the residents. The staff and laity in the congregation also become involved in the negotiation experience with the residents and navigating their own new experiences in ministry practice. Schön (1983) points out that intuitive responses may yield surprises, whether “pleasing and promising or unwanted,” and when this occurs practitioners are apt to respond by reflecting-in-action (p. 56). Engagement as a teaching congregation fosters the activity of reflection for participants on each side of the teaching and learning experience.

Conclusion 3: Failures, crises, and conflicts occurring within systems are contextual jolts leading to learning that can stimulate a change in behavior.

A shortage in the clergy supply was projected in the late 20th century, as noted earlier in this study. Meyer (1982) identifies changes in the environment as “transient perturbations,” describing them as “difficult to foresee and whose impacts on organizations are disruptive and potentially inimical” (p. 515). Meyer’s concept of an environmental jolt was provided as a means of describing the environmental context that prompted responses by denominations, seminaries, clergy leaders, and congregations. The pastoral residency program at Wilshire Baptist Church is among the specific programs that emerged. Marsick and Watkins (2003) point out that “learning takes place when disjunctures, discrepancies, surprises, or challenges act as triggers that stimulate a response” (p. 134). In the learning organization model, Marsick and Watkins (2003) claim these environmental jolts are among these learning triggers.

Disturbances, be they failures, crises, or conflicts, also occur within the context of the organization. These, too, can be unforeseen, and hold the potential for unwanted

outcomes and destructive results. When attention on these is not focused on assigning blame or determining cause, these jolts provide opportunity to stimulate a reorganization of practice, a reorientation of priorities, a change in behavior, or a further development of methods. The phenomenon of environmental jolts can plunge organizations into unfamiliar circumstances and “can legitimize unorthodox experiments that revitalize them, teach lessons that reacquaint them with their environments, and inspire dramas celebrating their ideologies” (Meyer, 1982, p. 535). The contextual jolts that occurred within and through the pastoral residency program at Wilshire facilitated learning at personal levels as well as more systemic levels.

One such jolt occurred as different views surfaced around the topic of homosexuality. The situation provided opportunity for teaching by the senior pastor with the residents. Though the situation was not easily resolvable, the senior pastor and residents took advantage of the opportunity to process and use the conflict as a method for teaching. Residents had the opportunity to gain experience in how congregations respond to disruptions and had one-to-one dialogue with the senior pastor, who openly shared strategy and reflection on how the congregation was handling the issue.

The laity are invested in the residents even after they leave the program and remain aware of their work in the places of their service. When these alumni residents experience failures and conflicts in their particular contexts, it becomes a jolt within the context of Wilshire for those who are following the alumni. One of the laity questioned whether they might have been able to prepare this individual in a way that made it possible to avoid such a conflict. Although they had not previously known to make such a preparation, they were able through the jolt to learn from the experience and make

adaptations in the future. Another resident, as a result of the difficulties in his context, chose not to continue in ministry. Again, questions among the laity arose about failures in the work they were doing. This process led to the opportunity to reaffirm the work they are doing in teaching and preparing these young clergy.

Another disruption, unforeseen, was the experience of the existing staff when the new residents entered. Residents received focused attention and had considerable quality personal time with the senior pastor. Existing staff were faced with making adjustments. Other measures were taken to utilize opportunities to bring existing staff together with the residents in pairs, which gave opportunities for relationships to develop with their new counterparts.

One of the most poignant jolts during the residency affecting the staff, laity involved, and perhaps even the congregation, was the early exit of one of the residents. Questions of failure rose, as did speculation regarding what could be done differently. This jolt led to a revision of the interview and acceptance process of residents into the program. A 6-month evaluation was implemented with the new residents; its purposes included avoiding misunderstandings of their role, functions, and program expectations. Staff leadership gained more clarity regarding the nature and demands of the program, and the type of character and caliber of the candidates who would make good matches to the program.

Conclusion 4: The constant influx of newcomers into the organizational system brings an infusion of new ideas, personal and organizational vitality, and clarification of roles and identity.

The pastoral residency program at Wilshire Baptist Church introduces two new residents each year. These residents serve for 2 years, providing for four residents in the program at all times. These residents are afforded exposure to multiple areas of the church's ministry, and given multiple opportunities to carry out responsibilities of preaching and teaching with large groups and small groups in the congregation. The mentoring and support relationships with laity and staff create opportunities for conversation and dialogue and exchange of reactions and ideas.

These residents are new and recent graduates of seminary or divinity school education. Having recently finished their preservice training, they bring current developments in theological studies and trends, have ideas ready to test, and harness enthusiasm for putting their education into practice. In interviews, staff and laity said that the residents bring vitality to the ministry of the congregation, and vitality and inspiration to the staff in their own work. The new experiences are described as otherwise not being present. It is believed that the church would not have had these experiences and opportunities absent this program.

March (1991) frames the infusion of newcomers in organizational learning. He compares an organization that models a closed system, "having a fixed membership and a stable reality" (p. 75), with that of an organization that models an open system which introduces personnel turnover. In the closed system, as individuals "become more knowledgeable, they also become more homogeneous with respect to knowledge"

creating a stable equilibrium. (March, 1991, p. 75). An organization with a modest level of turnover “improves aggregate knowledge.” The new personnel are typically less knowledgeable than the individuals being replaced. It is this difference in knowledge that holds the possibility for gains. March claims that the newcomers, when deviating from the organizational code in favorable ways, make contributions that serve to improve the organization and individual knowledge. “Old-timers, on average, know more, but what they know is redundant with knowledge already reflected in the code. They are less likely to contribute new knowledge on the margin” (March, 1991, p. 79). Residents, as newcomers, serve to keep the organization from becoming a closed system and falling into a stable equilibrium.

Residents are less knowledgeable about the existing congregation and its culture. Their naiveté, however, frees them to stretch the congregation to try new practices. These explorations (March, 1991) serve to keep the church and its people from becoming stagnant. Sometimes the ideas or practices presented are not unknown, but a young and new leader of the congregation making this presentation provides for a new reception. As this builds year to year, the laity grow into the expectancy that as new people come to learn with them, the residents will bring something new that the congregation needs.

Laity have responsibility with the lay mentoring committee to provide feedback to these residents who are new to the practice of ministry. Some of the discovery that occurs is recognition of the value in giving feedback to the existing staff. Providing mentoring and feedback to the residents is an expectation of the program. This regular function by the laity with the residents loops back and becomes recognized by the laity as a practice to implement with the existing staff. Learning in the organization is dependent on

individuals who learn to “take their learning back to the system” (Marsick & Watkins, 1999, p. 12), and organizations will learn “only through the experience and actions of individuals” (Argyris & Schön, 1978, p. 9). March (1991) poses “the development of knowledge may depend on maintaining an influx of the naïve and ignorant” (p. 86). The congregation, as a teaching organization, experiences learning among the individual participants and organizationally through this steady infusion of new residents.

Conclusion 5: Systemic change is facilitated by visionary leaders who combine strategic thinking with personal action.

Watkins and Marsick (1996a) have concluded that “leaders who model learning are key to the learning organization” (p. 7). They exercise strategic thinking for use of learning to stimulate change and movement of organizations in new directions. Leaders “consciously raise the knowledge capital of the organization” by supporting improvement in the “skills or knowledge of organizational members” (Watkins & Marsick, 1996a, p. 8). Furthermore, Watkins and Marsick (1996b) describe leaders as “charismatic, risk-taking, visionary change agents” and as “willing to change themselves” (p. 278). The senior pastor at Wilshire Baptist Church not only articulated a vision for the residency program in the congregation, but also has been fully engaged in multiple aspects. The staff speak appreciatively of his involvement and his shared leadership. One of the residents interviewed told how the pastor was open and reflective in meetings with the residents, and how he shared conversations with them regarding difficult issues in the church that the congregation was facing. In his own interview, the pastor reflected on his personal learning as a result of his involvement, and how he has changed his leadership style to be more collaborative. He in turn models the type of leadership the residency

seeks to teach. This reflects one of the key principles identified in a learning organization: the cultivation of “a learning habit in people and in the culture so that a spirit of inquiry, initiative, and experimental thinking predominates” (Watkins & Marsick, 1996b, p. 283).

The pastor fosters an environment of learning. He supports the involvement of the laity and invites them to be participants. He is visibly supportive of the residency program and the full participation of the residents in various teaching, preaching, and leadership roles. The associate pastor referenced the pastor’s engagement, support, and sharing of leadership in a comparison with another congregation with which he was familiar from his recent sabbatical study. The other congregation happened also to have a residency program, but it did not operate nearly as effectively as the Wilshire residency. The associate pastor concluded that the difference was due to the lack of engagement by the pastor of the other congregation. “Climate and culture are built by leaders and other key people who learn from their experience, influence the learning of others,” which then serves to establish an environment of expectations giving shape and support to the desired results (Marsick & Watkins, 2003, p. 134). The pastor at Wilshire modeled learning for the residents, as well as for the staff and laity of the church which served to build a learning climate and culture within the congregation. Visionary leadership set this residency in motion at Wilshire Baptist Church. This visionary leadership is linked to both the pastor emeritus and the current pastor. Each of these pastoral leaders had vision for learning about the pastoral ministry, thought and acted strategically, and made personal investments of implementation and support. The active, strategic, visionary

leadership modeled in this teaching congregation fits the pattern of how change happens in a learning organization.

Implications for Practice and Policy

The implications for practice and policy are organized in a progressive manner. The image of concentric circles serves as a conceptual lens. Beginning with training in the local congregation, the recommendations expand in scope and impact upon individuals and institutions, yet maintain a potential effect upon a local congregation.

Train Laity in Critical Reflection

Pastoral residency in the context of the teaching congregation provides multiple opportunities for residents and laity to be involved in activities of reflecting on practice and experiences. A foundational element in the learning for residents is in gaining experience through the residency. The *Pathways to Ministry* program at Wilshire is an example of the variety of venues and “events” of practice that residents can benefit from. “An event is something that comes to us through the senses, all at once. . . . An experience, however, is something one does, thinks, or feels” (Taylor, Marienau, & Fiddler, 2000, p. 25). For the event to become an experience, one must be attentive to what has happened, or call it back into the present and engage in some type of affirmation of the occurrence (Taylor, Marienau, & Fiddler, 2000). Reflection-on-action can result in “new perspectives on experiences, changes in behavior, and commitments to action” (Meriam, Caffaralla, & Baumgartner, 2007, pp. 174-175). By reflecting-on-action, one can consciously return to the experiences he or she has had, reevaluate them, decide what could be done differently, and then try out the difference decided upon (Meriam, Caffaralla, & Baumgartner, 2007).

The absence of reflection upon experience “will engender only limited kinds of leaning” (Taylor, Marienau, & Fiddler, 2000, p. 27). The process of critical reflection on experience engages individuals in making meaning (Taylor, Marienau, & Fiddler, 2000). Therefore, as reflection is a natural and normative element of the residency, and critical in the process of learning and meaning-making, training in critical reflection is recommended for congregations engaged in this practice of inductive clergy education. A curricular piece, or learning module, designed to introduce the values of reflection and methods for engaging reflection would be useful to laity and congregation leaders. This piece could be designed for delivery in traditional printed format and available online as a download.

Formalized Mentoring with New Congregational Hires

The initial years of transition from preservice clergy education to actual ministry practice have been documented as a difficult, sometimes detrimental period for beginning clergy (Carroll, 2006; Dash, Dukes, & Smith, 2005; Fishburn & Hamilton, 1984; McMillan, 2003; Oak, 2006; Schier, 2009b). The Lilly Endowment made a commitment to the inductive phase of clergy education through the Transition into Ministry (TiM) initiative that provided for a focused apprenticeship in local congregations (Wind & Wood, 2008). This resulted in the creation of over 30 programs that offered residency positions, such as *Pathways to Ministry* at Wilshire Baptist Church. The results and the benefits to these residents of the programs have indicated the value of a system of support that embraces them in these initial years of transition (Gortner, Johnson, & Burruss, 2011; Wind & Wood, 2008).

Currently, no new grants are being awarded by the Lilly Foundation to create more programs of residency. Seminaries and theological schools nonetheless are continuing to graduate individuals who will be making this initial transition into ministry practice. *Pathways to Ministry*, for example, while an exemplary program, accepts only two residents each year. If all the initial residency programs of the TiM initiative were to continue, its system of support would not provide enough placement opportunities for every graduate wishing to enter congregational ministry to serve in a residency. However, programs like the Wilshire residency can become models that other congregations could learn from and adapt for their full-time permanent hires of clergy in their first positions following graduation.

A formalized system of mentoring and support for clergy entering their first positions following graduation from seminary could serve to support beginning clergy in these crucial first years. Congregations, while capable of creating and implementing such programs on their own, would benefit from guidance and help from institutions with experience in this. The McAfee School of Theology, one of the theological schools that administered a residency program through the Lilly Endowment grants, has developed a program for congregations who wish to partner with them. Through its Center for Teaching Churches, McAfee currently provides a 2-year model for congregations who hire one of their graduates. The model includes guidelines, ongoing support, and a 2-year curriculum for working with a new graduate making the transition into ministry. This curriculum outlines 12 learning modules for use by a laity team in the congregation called a minister support committee. In addition to the framework model, curriculum, and ongoing support, the seminary provides for a trained coach to work with this new staff

member. This model is an excellent first step in expanding the reach of transitional support for graduates entering their initial place of service, but is still limited in scope. Congregations outside the network of this school would benefit from this model. Other seminaries would benefit in learning from the model and developing similar programs for their graduates and the congregations in their networks.

Congregational Action Toward Ministry as Collaborative Engagement

A partnership and collaborative environment emerges in the teaching congregation engaged in the inductive phase of clergy education. Few congregations are the size of Wilshire Baptist Church. Most congregations are smaller (Chaves et al., 1999). The Lilly Endowment grant initiative for pastoral residency programs has ended. Therefore, fewer still are the congregations that might have funds available for embarking on an extensive residency program. Still the question persists, can a congregation experience ministry as a collaborative engagement in the absence of a pastoral residency program?

Absent a formal pastoral residency other key elements contributing to collaboration in ministry are available in most congregations. Four key elements in the culture of a collaborative engagement in ministry include dialogue across the boundaries of clergy and laity, partnerships among the clergy and laity, reflection on practice – by groups in the congregation on ministry practice, and by the staff – and identification and creative action on contextual jolts.

The boundaries to cross over in dialogue include the traditional clergy and laity boundaries. This study has emphasized the importance of recognizing the importance of dialoging across the boundaries of age differences and generational differences.

Promoting cross over inquiry and dialogue is one aspect of the learning organization (Watkins & Marsick, 1993). Watkins and Marsick (1993) describe a *TALK* model as a guide for dialogue. The *TALK* model is as follows: Tell the person with whom you desire this dialogue from the start what you are thinking; Ask the other individual if he or she holds the same interpretation and if not ask his or her view; Listen with focused listening, and in a process of restating what is understood to confirm if this is what was meant; Keep open to the views of the other, thus making the talk a form of inquiry (Watkins & Marsick, 1993).

A second key element is that of creating partnership among the clergy and laity. Partnership can grow out of an environment of dialogue. Partnership among these groups requires shared power and authority, and relationships built on interdependence. A third element is that of reflection on practice. As the staff participates in reflection on their own work, and as a team when there are multiple clergy on staff, it will model the activity and value for the work of ministry in the congregation. Staff can then bring the activity of critical reflection into the partnerships they have with laity.

A fourth key element in moving toward a collaborative engagement in congregational ministry is the honest acknowledgement and creative dealing with contextual jolts. All congregations experience conflict, crises, surprises, and failures. This study revealed that an open approach to these jolts gave opportunity for the clergy and laity of the congregation to deal with these in a purposeful manner. The ability to participate in critical reflection provides the foundation to use jolts as a means for learning, affirmation, clarification of roles, and evaluation and necessary revision of practice.

Two additional factors are to be noted. One factor found in the Wilshire congregation was the posture of intentionality. Intentionality, fortunately, is not dependent upon having a pastoral residency program. Neither is it dependent upon congregational size, for the smallest of congregations to the largest can make this choice. The posture of intentionality is dependent upon the actions of leadership, pastoral leadership and the laity leadership. Leadership must take intentional and strategic action with these four key elements to move toward a ministry as collaborative engagement.

The second factor is that of a catalyst. The catalyst at work in the identity shift at Wilshire Baptist Church was the newcomer, the pastoral resident. It may be that a pastoral resident provides the optimal form of a catalyst. However, March (1991) points to open systems with moderate personnel turnover experiencing a boost to the system's learning and creativity. Possible newcomer situations in congregations include summer interns, student workers, and naturally new staff members. Congregational leaders should then recognizing these opportunities as potential catalytic periods and seek ways to employ the four key elements above in the assimilation of this newcomer to the congregational system.

The pastor at Wilshire commented on one thing that the pastoral residency taught him. "Well it has taught me that I know more about what I do than I knew I knew." If this preexisting condition was true for the individual, it might hold true for a congregation as well. A congregation, as an organization, may know more about what it does, as in ministry, than it knows it knows. That being the case, a congregation has the tools, and the knowledge, to move toward the collaborative engagement of ministry.

Moving Toward a Requirement for Residency Following Seminary

Other professions, such as medicine, law, and engineering, require significant periods of apprenticeship as emerging professionals make the transition into their practice (Wood, 2006). Aleshire (2008) notes that the custom of seminary graduates going directly into leadership roles following graduation is unique among the professions of practitioners. An effort to provide residency programs for clergy has been tested for just over a decade and made possible to a great degree through the generosity of the Lilly Endowment. A recent summary report that surveyed the alumni of various Lilly Endowment-funded Transition into Ministry (TiM) programs highlights the value of these for beginning clergy. Responses from 300 of the over 750 seminary graduates who participated provided the basis for the summary report. “90% of TiM alumni said they recommended their TiM program to new clergy or new seminary graduates” (Gortner, Johnson, & Burruss, 2011, p. 28). A strong case is being made for the benefits and strengths of residency programs for young clergy.

The residency programs have been an initial and targeted effort introducing possibilities with long-term positive implications for beginning clergy. This study also identified the values and mutual benefits for the congregation as an organization, and for its staff and laity. A strong argument can be made, merely on the basis of positive outcomes of these programs for the beginning clergy, for taking steps toward a broader application of these programs for seminary graduates. Given the findings of this initial study pointing to the benefits for congregations serving as teaching congregations and providing contexts for residencies, an even more compelling argument for such programs as a normative component of clergy education, if not a requirement, takes shape. The

benefits for congregations and the significant learning for residents immersed in practice contexts warrants investing the time and effort to develop a strategy for integrating these residency programs as a normative stage in the education of clergy entering congregational and pastoral ministry. A movement toward such a strategy could begin with the leadership of these first programs funded by the Lilly Endowment along with a representative group of seminary presidents and theological school deans.

Elective Classification of Congregational Engagement

Residency programs, like *Pathways to Ministry*, help to cultivate “habits for lifelong learning that are critical to excellence in ministry throughout one’s career” (Carroll, 2006, p. 230). A number of factors were identified by the alumni in the Transition Impact Study as “absolutely critical” in their pastoral development (Gortner, Johnson, & Burruss, 2011, p. 27). These factors included their supervisor, peers, congregation members, personal study, and mentors, all of which are included in the Wilshire program. The most influential factor identified by those surveyed was their interactions with church members (Gortner, Johnson, & Burruss, 2011). These important habits are cultivated in this inductive phase, but sustaining them requires ongoing relationships among clergy, congregations, and theological schools.

Community engagement practiced by colleges and universities in the United States offers examples for such ongoing relationships. *Engagement* refers to two-way interaction between the academy and the community. In shifting away from the expert model of knowledge delivery by the academy to the public, engagement moves “toward a more collaborative model in which community partners play a significant role in creating and sharing knowledge to the mutual benefit of institutions and society” (Weerts &

Sandmann, 2008, p. 74). Increasingly, colleges and universities have “turned to community engagement as a natural evolution of their traditional missions of service to recognize ties to their communities along with their commitments to the social contract between society and higher education” (Sandmann, Thornton, & Jaeger, 2009, p. 1). The focus of the social contract for seminaries is between the congregations and academic preparation of those who lead congregations. Aleshire advocates for theological schools having “a meaningful relationship with ecclesial bodies” (2008, p. 129). He sees that “theological schools have both the creativity and capacity to engage” (2008, p. 138) new models of relationship with churches.

A proposal for a new relationship model of a Congregational Engagement elective classification for seminaries has been explored. Modeled from the elective classification of the Carnegie Foundation for the Advancement of Teaching (CFAT) called Community Engagement, Congregational Engagement would bring seminaries and congregations “forward as active partners not only in the preparation of ministers, but as participants in the ongoing development and effectiveness of ministry” (Granger, 2010, p. 95). The proposal claims “these partnerships would aid congregations in their efforts to be effective and provide increased opportunities for laity and clergy” (Granger, p. 95). The collaborative relationships between seminaries and congregations would “give greater value to the clergy profession, and to the role of the theological school in partnership with congregations” (Granger, p. 92). A formal and engaged connection linking congregations and seminaries would incorporate strengths identified in the residency programs and extend these learnings into ongoing models of theological education and training.

Future Research

Recommendations for future research are presented in a natural progression.

Extension of this initial study to multiple cases is an obvious first step that serves to lay a foundation for the additional recommendations. By spiraling outward from a stage by stage movement, research findings will build upon the previous discoveries providing strength and depth to each new inquiry.

Replication of Study for Multiple Cases

This was an initial study focused on one congregation engaged in the inductive phase of clergy education. Given the findings of this initial study indicating the learning that occurs in the congregation as a teaching congregation, a comprehensive study of multiple congregations that are engaged in an inductive phase of clergy education would serve to strengthen these findings, or provide appropriate clarifications. The other teaching congregations that were involved in the TiM initiative would yield comparative data with this initial study. Do the other congregations in this initiative experience personal learnings among laity and staff that are similar or comparable to those of this study? What discoveries, changes, and stimulations do these congregations experience through this infusion of new pastoral leaders? Research of multiple cases would provide the opportunity to study the individual actors across the cases, such as comparisons of laity as individuals, the member support committees as groups, and the staff. Also, further investigation of the leaders across these cases would add to research on leadership in organizations. Identifying factors that stimulate or hinder learning in these congregations would be instrumental in providing applicable knowledge to future congregations that may explore beginning a residency.

Development of a Survey Instrument for Quantitative Study

This was a qualitative study with staff, laity, and residents of a single teaching congregation. The findings from this study could be utilized to develop a survey instrument for conducting a quantitative study in other teaching congregations. The survey could be arranged to test and investigate specific types of personal learning among the laity and the staff and would allow for focused questions regarding learnings about pastoral ministry. Questions focusing on the style, attitude, and activity of the leader within the organization would give deeper insights into the effects of leadership on the process of learning in the congregation as a learning organization. Specific factors that facilitate the learning could be tested for relevance and significance to the organization beyond their personal implications.

Adapting the Dimensions of Learning Organization Questionnaire

The findings from the study of this teaching congregation indicate signs of learning aligned with that of a learning organization. One of the ways “to chart the journey for the learning organization is to engage people in a conversation about how they currently perceive themselves against a set of practices used by other such organizations” (Marsick & Watkins, 1999, p. 58). The Dimensions of Learning Organization Questionnaire (DLOQ) is an instrument that enables “people to begin talking about the organization’s strengths and weaknesses as a learning system” (Marsick & Watkins, 1999, p. 49) and “captures the current status of an organization’s culture relative to the dimensions of a learning organization” (Watkins, Milton, & Kurz, 2009, p. 67). An adapted version of the questionnaire for use in a congregational setting that has paid staff and volunteers would extend the research into congregations as learning

organizations. The findings from this initial study of an exemplary case of a teaching congregation could be used to create a congregationally appropriate DLOQ. The questionnaire could be used first with the congregation of Wilshire Baptist Church, then extended to other congregations that have participated in the TiM initiative. Evaluations and study from these could be utilized by other congregations who are seeking to enhance their potential as teaching and learning congregations. The questionnaire could be used by researchers to identify the presence of learning organization elements in congregations, and in other nonprofit institutions that blend paid staff with volunteers.

Expand Scholarship of Engagement Study to Professional Schools

Work, study, and research are under way in the scholarship of engagement for universities and colleges (Sandmann, Thornton, & Jaeger, 2009; Weerts & Sandmann, 2008). Inquiry has included research to “understand how engagement has emerged out of competing understandings about knowledge flow and utilization” (Weerts & Sandmann, 2008, p. 79). Focus on the scholarship of engagement includes identifying and establishing institutional structures and environments for sustaining a two-way exchange of knowledge construction that is beneficial to research in the academy and service in the community. This area of research has focused on universities and colleges. Expansion of this field of research in the area of professional schools – institutions that train and educate for the clergy, law profession, and medical profession – may now be appropriate.

This study has shown the strength of clergy education that occurs in the context of a local congregation. How does the constructed knowledge in this setting outside the academic institution return and inform the academic institution? Expanding the study of the scholarship of engagement to professional schools could help pinpoint any existing

barriers to engagement in institutional and organizational structures. Furthermore, investigation into the attitude and practice of knowledge construction – is it a one-way transaction, or do signs of two-way exchange exist? – would prove enlightening. Might professional schools hold possibilities for the two-way flow of knowledge construction and learning? What is possible, and what would be the value of seeking a scholarship of engagement in professional schools? The mission of many professional schools may lean toward adopting an approach of engagement. The research of Weerts and Sandmann (2008) indicates that engagement agendas are adopted by universities through “deliberate attention to language, leadership behaviors, organizational structures, and the development of boundary spanners who act as knowledge and power brokers between university and external partners” (p. 86). Have any professional schools exercised such deliberate attention? If so, what can be learned from them?

Summary

C. E. Nelson (1998) believed that congregations, as social and corporate institutions, can change. Changes in the congregation, as an organizational system, occur through changing the parts of the system. Steinke (1996) pointed out that “change in one part produces change in another part, even in the whole” (p. 4) because the individual elements do not function “independently of the other components” (p. 6). At the organizational level, learning becomes a collective experience. As a teaching congregation engaged in pastoral residency, Wilshire shows signs of learning as an organization. Since becoming a learning organization is viewed as a long-term process (Marsick & Watkins, 2003), Wilshire is on course to be not only a teaching congregation, but a learning congregation. Teaching leads to learning, not only for the individuals

within the system, but for the congregation as an organization. By embracing the identity of a teacher, the congregation has become a learner, learning their way toward a new identity. The pastor, George Mason, identified the congregation's emerging identity as a place "where everyone's a minister, and we understand this is our work to do." Robert, a lay person, put it this way, ". . . I believe that with all my heart that ministry is the job of the church. It's not the job of the staff; I mean it's part of their job but unless you get everyone involved you can't do ministry." The new destination to which this congregation has journeyed and advocates for other congregations to explore is one where ministry is a collaborative engagement among the clergy and laity.

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APPENDIX A

TABLES

Table A1
Criteria Selection for Individual Interviews

<i>Data Source</i>	<i>Criteria</i>	<i>Justification</i>	<i>Interview Guide</i>
<i>Senior Pastor</i>	Person who holds the position	The senior pastor is leader of the staff and gives overall guidance to church and the pastoral residency program, and is the one responsible for initiating the residency program in the congregation.	C
<i>Pathways to Ministry Coordinator</i>	Person who holds the position	Coordinator has unique perspective on the value of the program, keen understanding of the workings of program in the congregation, and its impact on the congregation as a whole.	D
<i>Ministry Area Staff (2)</i>	Ministerial staff who serve as a leader over specified areas of the church's ministry (i.e. music, children, youth, adults). At least one is to have served on staff since beginning of residency program, or as close as possible to program beginning. Each staff member interviewed is to have served in a mentoring role for at least one pastoral resident.	Staff who have been present for full duration of the program can speak to the impact of the residency program in the congregation. Ministry area staff have knowledge of the areas in which residents serve on a rotational basis (Worship, Discipleship, Fellowship, Witness, Ministry and Stewardship). Staff who serve in a ministry content area have relationships and contact with the members. This contact allows for staff to have perspectives on the effects of the residency program upon specific areas of the church's ministry	D

<i>Data Source</i>	<i>Criteria</i>	<i>Justification</i>	<i>Interview Guide</i>
<i>Associate Pastor</i>	Person who holds the position	Person will have a broad perspective on the overall ministries of the congregation and how they are integrated within the congregation. This individual will have responsibilities for the coordination and cooperation of the ministries of the church as well.	D
<i>Current Pastoral Resident</i>	An individual who is currently serving in the role of pastoral resident, preferably having been in the position for at least one year.	The perspective of a pastoral resident, for whom the program is focused, is a crucial perspective. As a recipient of learning, as well as provider of ministry, pastoral residents have a perspective of the congregation as a teacher and a learner.	E
<i>Alumni of the Pastoral Residency Program</i>	An individual who has completed the two-year pastoral residency program. Preference is for someone who has been out of the program for two years or less.	In addition to the perspective of the pastoral resident, this individual will have the perspective of having completed the program.	E
<i>Members of Lay Mentoring Committee (2)</i>	Members of the lay mentoring committee interviewed are to have served on different committees. One individual is to have served during the first three years of the residency program; the other individual is to have served within the last three years of the program.	Members of the lay mentoring committee are congregation members with direct, and ongoing contact with the pastoral resident. They offer feedback to the resident from a church member perspective, which can be different from a staff perspective.	D

<i>Data Source</i>	<i>Criteria</i>	<i>Justification</i>	<i>Interview Guide</i>
<i>Church Leaders (2) Additional information below</i>	Members who have served in a leadership position in a governing body of the church (i.e. Deacons, Church Council, Finance Committee). One leader is to have served in the role of chair or equivalent when the congregation began the residency program. The other leader is to be currently serving as chair or equivalent in one of these leadership areas.	Church leaders will have a vantage point of having responsibility for key church functions, overseeing any changes to the church policy, structure, and or function. As a leader of a group, it allows for observance of any learning that moves from the individual level into the group level.	D

Table A2

Interview List & Criteria for Selection Sent to Program Administrator

<i>Data Source</i>	<i>Names/ Potential Names</i>	<i>Criteria</i>
<i>Senior Pastor</i>		Person who holds the position
<i>Pathways to Ministry Administrator</i>		Person who holds the position
<i>Ministry Area Staff (2)</i>		Ministerial staff who serve as a leader over specified areas of the church's ministry (i.e. music, children, youth, adults). At least one is to have served on staff since beginning of residency program, or as close as possible to program beginning. Each staff member interviewed is to have served in a mentoring role for at least one pastoral resident.
<i>Associate Pastor</i>		Person who holds the position
<i>Current Pastoral Resident</i>		An individual who is currently serving in the role of pastoral resident, preferably having been in the position for at least one year.
<i>Alumni of the Pastoral Residency Program</i>		An individual who has completed the two-year pastoral residency program. Preference is for someone who has been out of the program for two years or less.
<i>Members of Lay Mentoring Committee (2)</i>		Members of the lay mentoring committee interviewed are to have served on different committees. One individual is to have served during the first three years of the residency program; the other individual is to have served within the last three years of the program.
<i>Church Leaders (2) Additional information below</i>		Members who have served in a leadership position in a governing body of the church (i.e. Deacons, Church Council, Finance Committee). One leader is to have served in the role of chair or equivalent when the congregation began the residency program. The other leader is to be currently serving as chair or equivalent in one of these leadership areas.

Table A3
Proposed Interview Schedule

Table for Use with Scheduling Interviews

I do want to interview these in the order listed, if at all possible. Especially important is that interviews 1-4 are scheduled in that order. The middle interviews (5-9) are not as important. I do prefer to interview the remaining church members last.

Order of Interviews		Day	Time	Location
1	Senior Pastor (I)	Day 1		
2	Pathways to Ministry Coordinator(I)			
3	Lay Mentoring Committee Member			
4	Lay Mentoring Committee Member			
5	Church Staff Ministry Area Leader	Day 2		
6	Church Staff Ministry Area Leader			
7	Associate Pastor			
8	Current Pastoral Resident			
9	Pastoral Resident Alumnus	Day 3		
10	Church Leader			
11	Church Leader			

Table A4
Document Selection and Criteria

<i>Data Collection Source</i>	<i>Criteria</i>	<i>Justification</i>
<i>Church Policies - Previous</i>	Materials in place prior to the beginning of the pastoral residency program that identify the governing policies and procedures of the congregation	In order to determine what, if any, structural changes or developments have occurred because of the residency program a view and description of the structure of the congregation, how it was organized for ministry, and how decisions were made before the program began is necessary.
<i>Church Policies - Current</i>	The current materials that identify the governing policies and procedures of the congregation	These are needed in order to make comparison with the materials used to govern the church prior to the residency program.
<i>Publicity and Information materials about the Congregation</i>	Current church brochures, pamphlets, and publicity information about the church that are given to visitors, guests, and to the community to introduce the congregation to others.	These materials will be used to determine how the church reflects its identity in light of the residency program.
<i>Church Newsletters</i>	Preference is to have a copy of all church newsletters from 2003 to the present. Digital files of these can be sent via e-mail, printed copies will also be acceptable.	Newsletter publications in congregations typically contain a full range of the activities, reports, and general record of the life of the congregation. Reviewing newsletters from one full year prior to the beginning of the residency program through to the current time period provides opportunity to track expectations, changes, shifts, and developments in the congregation.

<i>Data Collection Source</i>	<i>Criteria</i>	<i>Justification</i>
<i>Pathways to Ministry Documents</i>	Recommendation materials made to the congregation to engage in this program: any reports to the church concerning projected plan, implementation, and funding of the program	These materials may outline expectations the congregation and leaders had regarding the function and outcomes of the program.
	Application materials presented to the grantor to receive funding for the program, including materials for the first and the second grant	These materials may contain anticipated outcomes for the residency program, and commitments that the congregation made to conduct the residency program.
	Reports, memos and correspondence between the congregation and the grantor	These materials may contain progress, effects, impacts, changes, and problems associated with the implementation of the residency program.
	Materials that outline the function of the residency program	These will provide for comparison of the stated understanding and procedures of the residency program to the reflections and experiences that members and staff have.

APPENDIX B

RESEARCHER BIAS AND ASSUMPTIONS

My interest and passion in this subject is both professional and personal. I have served in the local church for over twenty years as an ordained clergy leader, participated in peer learning groups and professional groups, and served as an adjunct instructor in the seminary setting. These experiences and the shared stories among colleagues have deepened my awareness that clergy education in the pre-service phase is not sufficient for life-long service in contexts of ministry. Furthermore, I have come to see, and experience, the transformative power of congregations in the development of clergy as clergy serve in local contexts. These strengths of my past and current experience also open me to insider bias. Though not a member of the specific congregation that is the subject of this case study, as a member of the clergy serving in local congregations my experiences with boards, committees, and members may influence the way I interpret what I hear in the interviews.

One of the assumptions I bring to this study is that congregations, whether aware or not, do have a formative impact upon clergy. A second assumption I bring is that congregations can learn from the relationship they have with clergy and can change in ways that provide for a more intentional and positive influence and shaping upon the clergy who serve them. I believe that by making changes to improve the relationship with clergy, that congregations will be viewed by seminary students, and other young adults as viable, attractive places for establishing a career. I have belief and hope that the laity in

churches are among the key people who can both nurture individuals to consider this career, as well as have a positive impact on clergy who continue to serve them.

APPENDIX C

INTERVIEW GUIDES

Interview Guide A – Pilot Interview Guide for Pastor

1. As a church leader, you have a vision for something in the church, and a dream of what can happen. In your first visions of this residency program, what did you see and desire as the potential for this residency program?
2. Why did your congregation become involved in the teaching and training of clergy?
3. One of the silent moments we sometimes have as a church leader is the moment when we say to ourselves, “they are catching on, they get it, that is what this is all about.” Talk about that experience you have had with this residency program, that is assuming have had this experience at least once, maybe more.
4. Was there ever a time when you thought, “this is never going to work?” If so, what occurred to give you this thought, and what happened? What has the congregation learned from any of the mistakes that have been made?
5. Describe a time when you realized that this residency program was making a difference for this congregation.
6. How has this residency program impacted you?

Interview Guide B – Pilot Interview Guide for Lay Person

8. When you reflect back on your experience with this committee, what do you know now that you did not know that is important for young clergy to learn?
9. An experience with a group, over an extended period of time, usually leads to a variety of discoveries. Describe something you learned about your congregation that you did not know prior to being involved in this committee.
10. Often times a group doesn't begin to gel, and go deeper, until some time passes, or a particular event or experience occurs. Describe when you experienced a turning point in the group, and what happened.
11. Was there ever a time when a conflict or crisis arose with the committee? If so, describe what happened and how it was handled. (When did you experience a time of real difficulty on this committee.)
12. What did the committee learn from any mistakes that have been made?
13. Describe a time when you realized that this residency program was making a difference for the congregation.
14. How has this residency program impacted you?

Interview Guide C - Interview Guide for Wilshire: Pastor

Initial Question: How did the pastoral residency get started here at Wilshire?

Follow Up Question: What was your vision, your dream for teaching and training of clergy – What were your expectations?

Primary Question 1: What has this experience taught you?

Possible follow ups:

How did you come to this discovery? (Listening for an event, a conversation, or a reflection)

Have you shared this with anyone else? If so, who, when, and how?

What have you done with this learning/insight?

Primary Question 2: What has this experience in pastoral residency taught you about ministry? (Listening here for descriptions on ministry in the church, the role of clergy in the church, relationships with clergy and laity)

Possible follow ups:

How is this different from your previous views and perceptions of ministry?

Was there a particular occurrence that captures this change in your views?

Primary Question 4: What has this taught your staff?

Primary Question 3: What has this experience in teaching and training young clergy taught your church?

Possible follow ups:

What has the church, or church leadership, done with these discoveries?

Do you hear the members of the staff discuss these discoveries?

Is there any evidence you see where this is generated any kind of change in the congregation?

How do you see this showing up in the congregation?

If you were to capture this in a story to tell to someone, what story would you tell?

What has changed here at Wilshire because of this? (I would like to suggest the framework for answering this by using the phrase, “that was then but this is now,” as a means of describing the “now” that is different. I am wondering if this could be a useful and conceptual way for someone to answer. Kind of an open ended lead to complete the sentence from their perspective).

Interview Guide D - Interview Guide for Wilshire: Staff and Laity

Introductory Question: Tell me how you have been involved with the *Pathways to Ministry* Program at Wilshire Baptist Church.

Primary Question 1: What has this experience taught you?

Possible follow ups:

How did you come to this discovery? (Listening for an event, a conversation, or a reflection)

Have you shared this with anyone else? If so, who, when, and how?

What have you done with this learning/insight?

Primary Question 2: What has this experience in pastoral residency taught you about ministry? (Listening here for descriptions on ministry in the church, the role of clergy in the church, relationships with clergy and laity)

Possible follow ups:

How is this different from your previous views and perceptions of ministry?

Was there a particular occurrence that captures this change in your views?

Was this something that you have discovered in your reflections about your experience?

Have you discussed this with anyone? Who?

Primary Question 3: What has this experience in teaching and training young clergy taught your church?

Possible follow ups:

What has the church, or church leadership, done with these discoveries?

Do you hear the members of the staff discuss these discoveries?

Is there any evidence you see where this is generated any kind of change in the congregation?

How do you see this showing up in the congregation?

If you were to capture this in a story to tell to someone, what story would you tell?

What has changed here at Wilshire because of this? (I would like to suggest the framework for answering this by using the phrase, “that was then but this is now,” as a means of describing the “now” that is different. I am wondering if this could be a useful and conceptual way for someone to answer. Kind of an open ended lead to complete the sentence from their perspective).

Interview Guide E – Interview Guide for Pastoral Residents

1. When you began in your role as a pastoral resident, how did the congregation describe themselves in relation to you?
2. As a pastoral resident you have a unique role in being both a minister to the congregation and a learner from the congregation as your teacher. Describe a time when you experienced the congregation as your teacher. (What did they teach you?) (What did you learn from them?)
3. What did you learn about this congregation as you served in this role?
4. Was there ever a time when observed the congregation learning from you? Describe this experience.
5. Describe a time when you realized that this residency program was making a difference for this congregation.
6. What did the congregation learn from this experience of providing a place of pastoral residency for you and those who served with you?
7. There comes a time after you being a new job when you no longer feel that you are new, or a guest in the organization. Describe when and what happened when you realized that you were engaged in ministry with the members of this congregation.

APPENDIX D

IRB



Human Subjects Office (HSO)

612 Boyd GSRC ■ Athens, GA 30602-7411

Phone: 706-542-3199 ■ Fax: 706-542-3360 ■ irb@uga.edu

DHHS Assurance No.: FWA00003901

Institutional Review Board (IRB)

HUMAN RESEARCH APPLICATION

To submit:

<http://www.ovpr.uga.edu/hso/how/application>

IMPORTANT: Please respond to all the questions. Do not leave items blank; if not applicable, mark N/A. Please note that incomplete applications may result in delayed review. Click on the hyperlinks (text underlined in blue) to obtain additional information.

For Human Subjects Office Use Only

Project #: _____ Date _____

Received: _____

Type of Review: ☐ Exempt

☐ Expedited

☐ Full Board

Section A: PROJECT INFORMATION

1. Study Title: **Teachers as Learners: Organizational Learning in Teaching Congregations**

2. Application Type: ☒ New Project ☐ Response to Initial Review (*All revisions must be in italics or different font color.*)

☐ 5-Year Renewal; Previous IRB number: _____

3. Principal Investigator: (*Must be UGA faculty or senior staff. See [Eligibility to Serve as PI.](#)*)

Name: Lorilee R. Sandmann Title: Dr.

Department Name: Lifelong Education Administration and Policy

Mailing Address: 850 College Station Road, 413 Rivers Crossing Building, Athens, GA 30602

Phone: -5424014 UGA E-mail (Required): sandmann@uga.edu

4. Co-Principal Investigator: (*Required only if for thesis/dissertation or other student project.*)

Name: C. Franklin Granger Title: Mr.

Department: Lifelong Education Administration and Policy

Mailing address:

Phone: UGA E-mail (Required): frank@uga.edu

5. Anticipated Start Date: *(Must be at least 4 weeks after application is received.)*
November 11, 2010

Section B: PROJECT FUNDING

1. Funding Status: ☐ **Funded** ☐ **Pending** ☒ **No Funding**

2. Funding Source: ☐ Internal Account #: ☐ External Funding Source: OSP Proposal or

Award #:

3. Name of Proposal or Award PI (if different from PI of IRB protocol): N/A

4. Proposal or Award Title (if different from title of IRB protocol): N/A

Section C: STUDY PERSONNEL / RESEARCH TEAM

Including the PI, identify all personnel who will be [engaged in the conduct of human research](#).

Important Note: All researchers listed below are required to complete the [CITI IRB Training](#) prior to submission of this application. This application will be returned to PI for resubmission if training requirement has not been satisfied. To add more names, bring cursor to outside of last row, and press "enter" key.

Name	E-mail	*Institution
Lorilee R.	sandman	University of Georgia
C. Franklin	frank@ug	University of Georgia

*Submit an [Individual Investigator Agreement](#) for all study personnel affiliated with an institution that does not have an assurance with the Office for Human Research Protections or OHRP (typically, local schools, private doctors' clinics).

Section D: PRINCIPAL INVESTIGATOR'S ASSURANCE

As the Principal Investigator, I have the ultimate responsibility for the conduct of the study and the protection of the rights and welfare of human participants. By affixing my signature below,

- I assure that all the information contained in this Human Research Application is true and all the activities described for this study accurately summarize the nature and extent of the proposed participation of human participants.
- If funded, I assure that this proposal accurately reflects all procedures involving human participants described in the grant application to the funding agency.
- I agree to comply with all UGA policies and procedures, as well as with all applicable federal, state, and local laws on the protection of human participants in research.
- I assure that all personnel listed on this project are qualified, appropriately trained, and will adhere to the provisions of the approved protocol.
- I will notify the IRB regarding any adverse events, unexpected problems or incidents that involve risks to participants or others, and any complaints.

- I am aware that no change(s) to the final approved protocol will be initiated without prior review and written approval from the IRB (except in an emergency, if necessary to safeguard the well-being of human participants and then notify the IRB as soon as possible afterwards).
- I understand that I am responsible for monitoring the expiration of this study, and complying with the requirements for an annual continuing review for expedited and full board studies.
- If human research activities will continue five years after the original IRB approval, I will submit a new IRB Application Form. (*Exceptions:* If the research is permanently closed to the enrollment of new participants, all participants have completed all research-related interventions, and the research will remain active only for long-term follow-up of participants; or if the remaining research activities are limited to analysis of individually-identifiable private information.)
- I understand that the IRB reserves the right to audit an ongoing study at any time.
- I understand that I am responsible for maintaining copies of all records related to this study in accordance with the IRB and sponsor guidelines.
- I assure that research will only begin after I have received notification of final IRB approval.

Signature of Principal Investigator _____ Date (mm/dd/yyyy): 10112010

Section E: CONFLICT OF INTEREST (COI)

1. Is there any real, potential, or perceived conflict of interest on the part of any study personnel (*e.g., financial or business interest, stock or stock options, proprietary interest, inventorship, consultant to sponsor*)? ☐ Yes ☒ No

2. If yes, please identify personnel and explain. **Important Note:** Please review the [UGA Conflict of Interest Policy](#).

Final IRB approval cannot be granted until all potential conflict matters are addressed. N/A

Section F: LAY PROJECT SUMMARY

Briefly describe in simple, non-technical language a summary of the study, its specific aim(s)/objective(s), and its significance or importance. ***Response should be limited to 250 words and easily understood by a layperson.*** The purpose of this case study is to identify how teaching congregations learn in the process of facilitating the training and development of beginning clergy who are making the transition from seminary education into professional ministry. The research intends to discover what and how the congregation learns in this process along with the factors which facilitate or impede the learning, and if any changes in structure, roles, and organization occur. This study plans to expand the application and use of organizational learning theory into the field of congregational studies for the purpose of aiding congregations in understanding of their organizational system. Practically, this study provides not only insight and understanding of the teaching relationship for the congregations who are engaged in facilitating the training and development of beginning clergy, but will offer incentives

and guidance for congregations who are considering becoming a teaching congregation engaged in clergy training. Staff in these congregations will have knowledge of what is effective in serving as mentors to these clergy in training. As church leaders and program directors seek to recruit new congregations to engage in this process of clergy education, findings from this study may provide insightful information that will offer answers to the questions congregations will ask regarding, “What’s in it for me?”

Section G: HUMAN RESEARCH PARTICIPANTS

1. Provide a general description of the targeted participants (e.g., healthy adults from the general population, children enrolled in an after-school program, adolescent females with scoliosis), **and indicate the estimated total number, targeted gender, and age.** To add a row, bring cursor to outside of last row, and press “enter” key.

Targeted Population	Total	Targeted	Specify age
Paid Staff in	20	Male &	18 and
Members in	45	Male &	18 and

2. Identify the inclusion and exclusion criteria. If two or more targeted populations, identify criteria for each.

a. List inclusion criteria. Adult staff in congregations. Staff members employed by the congregation that serve in a ministry role. The adult members of congregations are individuals who participate in the activities, programs and leadership within the congregation.

b. List exclusion criteria. N/A

3. If the research will exclude a particular gender or minority group, please provide justification. N/A

4. Will participants receive any incentives for their participation (e.g., payments, gifts, compensation, reimbursement, services without charge, extra class credit)? ☐ Yes ☒ No

a. If yes, please describe. For multiple sessions, include scheme to pro-rate incentives. N/A

b. If offering extra class credit, describe a comparable non-research alternative for receiving incentive. N/A

Section H: RECRUITMENT AND ELIGIBILITY OF PARTICIPANTS

1. Describe how potential participants will be initially identified (e.g., public records, private records, etc.). Through contact and communication with the on-site church staff person.

2. Describe when, where, and how participants will be initially contacted. Participants will be contacted by the church staff representative through direct personal communications.

3. Advertisements, flyers, and any other materials that will be used to recruit participants must be reviewed and approved before their use. Check all that apply below and submit the applicable recruitment material/s.

☐ No Advertising ☐ Bulletin boards ☒ Electronic media (e.g., listserv, emails) ☐ Letters

☐ Print ads/flyers (e.g., newspaper) ☐ Radio/TV ☒ Phone call ☒ Other (please describe)

AND VERBAL. FOR THE INTERVIEWS: I AM PH.D. STUDENT AT THE UNIVERSITY OF GEORGIA AND AM STUDYING CONGREGATIONS THAT ARE INVOLVED IN THE TRAINING OF BEGINNING CLERGY. YOUR CHURCH IS INVOLVED IN THIS TYPE OF PROGRAM AND HAS AGREED TO ALLOW ME TO STUDY YOUR CONGREGATION. I HAVE RECEIVED YOUR NAME THROUGH THE PATHWAYS TO MINISTRY COORDINATOR AS SOMEONE WHO HAS BEEN INVOLVED WITH THIS PROGRAM. I WOULD LIKE TO INTERVIEW YOU, BY ASKING A FEW QUESTIONS ABOUT YOUR KNOWLEDGE AND EXPERIENCE WITH THIS PROGRAM IN YOUR

CHURCH. THE INTERVIEW WOULD TAKE PLACE AT THE CHURCH, AND WOULD REQUIRE ABOUT AN HOUR OF YOUR TIME, AND IS COMPLETELY VOLUNTARY.

FOR THE FOCUS GROUPS: I AM PH.D. STUDENT AT THE UNIVERSITY OF GEORGIA AND AM STUDYING CONGREGATIONS THAT ARE INVOLVED IN THE TRAINING OF BEGINNING CLERGY. YOUR CHURCH IS INVOLVED IN THIS TYPE OF PROGRAM AND HAS AGREED TO ALLOW ME TO STUDY YOUR CONGREGATION. I HAVE RECEIVED YOUR NAME THROUGH THE PATHWAYS TO MINISTRY COORDINATOR AS SOMEONE WHO HAS BEEN INVOLVED WITH THIS PROGRAM. I WILL BE CONDUCTING A FOCUS GROUP WITH MEMBERS FROM YOUR CHURCH AND WOULD LIKE TO INVITE YOU TO PARTICIPATE BY ASKING A FEW QUESTIONS ABOUT YOUR KNOWLEDGE AND EXPERIENCE WITH THIS PROGRAM IN YOUR CHURCH. THE FOCUS GROUP WOULD TAKE PLACE AT THE CHURCH, AND WOULD REQUIRE ABOUT AN HOUR OF YOUR TIME, AND IS COMPLETELY VOLUNTARY.

4. **Describe any follow-up recruitment procedures.** Confirmation by researcher via personal communication.
5. **Describe how eligibility based on the above inclusion/exclusion criteria will be determined** (e.g., self-report via a screening questionnaire, hospital records, school records, additional tests/exams, etc.). N/A

Section I: RESEARCH, DESIGN, METHODS AND PROCEDURES

1. Describe the research design and methods of data collection. This study is a qualitative case study researching two congregational cases. Data will be collected through interviews, focus groups and the organization's public documents. Interviews: For this case study both staff members and congregation members will be interviewed using an interview guide. The Senior Pastor, who serves as leader of the staff and gives overall guidance to the church and the pastoral residency program will be interviewed. Additional staff planned to be interviewed will include but not be limited to the Pathways to Ministry Coordinator, two ministry area staff who have served in a mentoring role for at least one pastoral resident, and the Associate Pastor. Pastoral residents in the program are to be interviewed as well, including at least one who has completed the program. Individual interviews will be conducted with lay members of the congregation also. Lay members to be interviewed will include, but not be limited to individuals who have served as members of a Lay Mentoring Committee, church leaders who have served in leadership positions in a governing body of the church.

Focus Groups: Recruiting for the focus groups will be done with the assistance of an on-site person in the congregation. As potential participants are identified, they will be invited to participate in a focus group for the purpose of engaging in a discussion of sharing their experiences with the Pathways to Ministry program. I, as the researcher, will serve as the moderator of the focus groups. Provided that sufficient budgetary funds are available, I will employ an assistant to help with recording and taking observation notes. Initial plans for this study call for a five focus groups. Three of these groups are comprised of individuals parallel to those individuals to be interviewed during the interview stage of data collection. Two additional groups are planned comprised of church members that would not be considered for any of the other categories of interview or focus group participants. One focus group of ministry area staff will be conducted. A group of church leaders will comprise a second focus group. Thirdly, a focus group comprised of individuals who have served as members of a lay mentoring committee will be selected. The final two focus groups will be comprised of church members. These are

to be members considered active participants in the church (attends church at least 60% of the time) and that participate in worship and at least one additional regular activity/group/ministry of the church. These individuals should consist of members who have not served as chair or leader of a specific committee or group; nor as member of a lay mentoring committee.

Documents: Documents from the congregation will be used from the congregations. The documents collected as data in this study will include, but are not limited to, policies and documents reflecting the structure and operation of the church prior to the congregation's first residency experience and any revised documents, or new ones that have emerged as a result of this experience as a teaching congregation. Public materials such as church newsletters and publicity and informational materials about the church will also be gathered. Specific documents related to the Pathways to Ministry program, including but not limited to, materials outlining the function of the program, descriptions and publicity of the program, memos, reports and recommendations to the church concerning the program, will be requested. Additionally, reports and communications to the funding organization regarding the Pathways to Ministry program will be studied. However, during the sites visits, any relevant documents will be gathered.

2. **If applicable, identify specific factors or variables and treatment conditions or groups (include control groups).** N/A
3. **Indicate the number of research participants that will be assigned to each condition or group, if applicable.** N/A
4. **Describe in detail, and in sequence, all study procedures, tests, and any treatments/research interventions. Include any follow-up(s).** ***Important Note:** If procedures are long and complicated, use a table, flowchart or diagram to outline the study procedures from beginning to end.* INDIVIDUAL INTERVIEWS WILL BE CONDUCTED AND COMPLETED BEFORE CONDUCTING THE FOCUS GROUPS. INTERVIEW DATA FROM THE RECORDINGS WILL BE TRANSCRIBED. THOSE INTERVIEWED WILL BE GIVEN OPPORTUNITY TO CONFIRM THEIR RESPONSES AND CLARIFY ANY DISCREPANCIES IN THE TRANSCRIPTION OF THE INTERVIEW THROUGH A PROCESS OF MEMBER CHECKS. UPON COMPLETION OF THIS PROCESS WITH ALL INTERVIEW DATA, FOCUS GROUPS WILL BE CONDUCTED. DOCUMENT MATERIALS WILL BE COLLECTED THROUGHOUT THE PROCESS.
5. **Describe the proposed data analysis plan and, if applicable, any statistical methods for the study.** Interview and focus group data will be analyzed using the constant comparative method and coding scheme using word processing software. Data from interviews and focus groups will be recorded and transcribed. A code number will be assigned to each participant interviewed, and a separate master list matching the code numbers with the files will be kept to link each individual's actual identity to the transcripts. Each transcribed interview and focus group discussion will be saved as a separate document, and a copy file will be created with a different file name for analysis. Data will be analyzed, coded, and studied following approved procedures for qualitative data analysis. Transcripts will be kept electronically in researchers secure computer for use up to five years after which data will be securely deleted
6. **Anticipated duration of participation.**
 - a. Number of visits or contacts: Minimum of 2 on-site visits per congregation. 1 DATA COLLECTION SESSION IS TO BE HELD WITH EACH PARTICIPANT.
 - b. Length of each visit: Multiple days as is necessary to schedule and complete the interviews and focus groups. EACH INTERVIEW DATA COLLECTION SESSION IS TO BE APPROXIMATELY 1 HOUR IN LENGTH. FOCUS GROUP SESSIONS ARE TO BE APPROXIMATELY 1 AND ½ HOURS IN LENGTH.
 - c. Total duration of participation: 30 Days, WITH APPROXIMATELY 30 HOURS FOR INTERVIEWS AND 10 HOURS FOR FOCUS GROUPS.

Section J: DATA COLLECTION INSTRUMENTS

List and describe all the instruments (interview guides, questionnaires, surveys, etc.) to be used for this study. Attach a copy of all instruments that are properly identified and with corresponding numbers written on them. To add a row, bring cursor to outside of last row, and press "enter" key.

Number	Instrument	Brief Description	Identify group(s) that will complete
A	Interview Guide	Guiding questions for conducting interview	Pastor
B	Interview Guide	Guiding questions for conducting interview	Program Coordinator
C	Interview Guide	Guiding questions for conducting interview	Paid Staff
D	Interview Guide	Guiding questions for conducting interview	Church Committee Members
E	Interview Guide	Guiding questions for conducting interview	Church Leaders
F	Interview Guide	Guiding questions for conducting interview	Pastoral Residents

Section K: RISKS AND BENEFITS

1. Risks and/or discomforts

Describe any reasonably foreseeable psychological, social, legal, economic or physical risks and/or discomforts from all research procedures, and the corresponding measures to minimize these. **Important Note:** If there is more than one study procedure, please identify the procedure followed by the responses for both (a) and (b).

- Risks and/or discomforts. N/A
- Measures to minimize the risks and discomforts to participants.

2. Benefits

- Describe any potential direct benefits to study participants. If none, indicate so. **Important Note:** Please do not include compensation/payment/extra credit in this section, as these are "incentives" and not "benefits" of participation in research; any incentives must be described in Section G.4. Participants may benefit from personal reflection on their own learning.
- Describe the potential benefits to society or humankind. The study will provide evidence to show that the time, money, and people resources required and devoted to these programs can be of benefit to the congregation.

3. Risk/Benefit Analysis

- Indicate how the risks to the participants are reasonable in relation to anticipated benefits, if any, to participants and the importance of the knowledge that may reasonably be expected to result from the study (i.e., How do the benefits of the study outweigh the risks, if not directly to the participants then to society or humankind?). THE BENEFITS AND VALUE OF THE KNOWLEDGE GAINED FROM CONGREGATIONAL MEMBERS AND THEIR DIRECT INVOLVEMENT IN THE TEACHING AND TRAINING OF BEGINNING CLERGY WILL BE OF SIGNIFICANT VALUE TO OTHER CONGREGATIONS WHO MAY BE PLANNING TO PARTICIPATE IN SIMILAR PROGRAMS. THERE ARE NO ANTICIPATED RISKS FOR INDIVIDUALS OR THE CONGREGATION AS RESULT OF PARTICIPATION IN THIS STUDY.

4. Sensitive or Illegal Activities

- Will study collect any information that if disclosed could potentially have adverse consequences for participants or damage their financial standing, employability, insurability, or reputation (*includes but not limited to sexual attitudes, preferences, or practices; HIV/AIDS or other sexually transmitted diseases; use of alcohol, drugs, or*

other addictive products; illegal conduct; an individual's psychological well-being or mental health; and genetic information)?

No

b. If yes, explain how the researchers will protect this information from any inadvertent disclosure.

5. Reportable Information

a. Is it reasonably foreseeable that the study will collect or be privy to information that State or Federal law requires to be reported to other officials (e.g., child or elder abuse) or ethically might require action (e.g., suicidal ideation, intent to hurt self or others)? No

b. If yes, please explain and include a discussion of the reporting requirements in the consent document(s).

Section L: DATA SECURITY AND FUTURE USE OF INFORMATION

1. Data Security

Check the box that applies.

- ☐ Anonymous – **The data and/or specimens will not be labeled with any individually-identifiable information (e.g., name, SSN, medical record number, home address, telephone number, email address, etc.), or labeled with a code that the research team can link to individually-identifiable information.**
- ☐ Confidential – **The responses/information may potentially be linked/traced back to an individual participant, for example, by the researcher/s (like in face-to-face interviews, focus groups).** If necessary, provide additional pertinent information.
- ☒ Confidential – Indirect identifiers. **The data and/or specimens will be labeled with a code that the research team can link to individually-identifiable information. If the data and/or specimens will be coded, describe below how the key to the code will be securely maintained.**
- ☐ Paper records will be used. **The key to the code will be secured in a locked container (such as a file cabinet or drawer) in a locked room. The coded data and/or specimens will be maintained in a different location.**
- ☒ Computer/electronic files will be used. **The key to the code will be in an encrypted and/or password protected file. The coded data file will be maintained on a separate computer/server.**
- ☐ Other (please specify), or provide additional pertinent information.
- ☐ Confidential – Direct Identifiers. **The data and/or specimens will be directly labeled with the individually-identifiable information.**
- ☐ Paper records will be used. **The information will be secured in a locked container (such as a file cabinet or drawer) in a locked room.**
- ☐ Computer/electronic files will be used. **The information will be stored in an encrypted and/or password protected file.**
- ☐ Other (please specify), or provide additional pertinent information.

- ☐ **Confidential – Direct Identifiers.** The data and/or specimens will be directly labeled with the individually-identifiable information.
- ☐ Paper records will be used. **The information will be secured in a locked container (such as a file cabinet or drawer) in a locked room.**
- ☐ Computer/electronic files will be used. **The information will be stored in an encrypted and/or password protected file.**
- ☐ Other (please specify), or provide additional pertinent information.

If “Confidential” is marked, please answer all the following:

Explain why it is necessary to keep direct or indirect identifiers. For the purpose of conducting member checks.

Identify who will have access to the individually-identifiable information and/or the key to the code. The researcher

- ☐ **Public.** Information will be individually-identifiable when published, presented, or made available to the public.

2. Future Use of Information

If individually-identifiable information and/or codes will be retained after completion of data collection, describe how the information will be handled and stored to ensure confidentiality. Check all that apply.

- ☐ All data files will be stripped of individually-identifiable information and/or the key to the code destroyed.
- ☐ All specimens will be stripped of individually-identifiable information and/or the key to the code destroyed.
- ☒ Individually-identifiable information and/or codes linking the data or specimens to individual identifiers will be retained. ***If this box is checked, describe:***

a. Retention period. **NO MORE THAN 6 MONTHS**

b. Justification for retention. **FOR THE PURPOSE OF CONDUCTING MEMBERS CHECKS. FOLLOWING THIS, INDIVIDUALLY-IDENTIFIABLE INFORMATION WILL BE DESTROYED.**

c. Procedure for removing or destroying the direct/indirect identifiers, if applicable. **Files deleted.**

- ☒ **Audio and/or video recordings (if applicable) will be transcribed/analyzed and then destroyed or modified to eliminate the possibility that study participants could be identified.**

- ☐ **Audio and/or video recordings (if applicable) will be retained. *If this box is checked, describe:***

a. Retention period.

b. Justification for retention.

- ☐ **Other (please specify), or provide additional pertinent information.**

Section M: CONSENT PROCESS

Important Note: The IRB strongly recommends the use of consent templates that are available on the IRB website to ensure that all the elements of informed consent are included (per 45 CFR 116). If more than one consent document will be used, please name each accordingly.

- ☒ **The PI is attaching a copy of all consent documents that participants will sign.**

☐ **The PI is requesting that the IRB waive requirement to document informed consent.** A signed consent form may be _____ waived if one of the following criteria is met, **check the box that applies.**

- ☐ 1. The only record linking the participant and the research would be the consent document and the principal risk would be potential harm resulting from a breach of confidentiality. Each participant will be asked whether the participant wants documentation linking the participant with the research, and the participant's wishes will govern; or
- ☐ 2. The research presents no more than minimal risk of harm to participants and involves no procedures for which written consent is normally required outside of the research context.

The consent script or cover letter that will be used in lieu of a consent form is attached.

(Choose YES or NO)

☐ **The PI is requesting that the IRB approve a consent procedure which does not include, or which alters, some or all of the elements of informed consent set forth in 45 CFR 116, or waive the requirement to obtain informed consent.** An informed consent may be waived if the IRB finds that all of the following have been met:

- 1. The research involves no more than minimal risk to the participants;
- 2. The waiver or alteration will not adversely affect the rights and welfare of the participants;
- 3. The research could not practicably be carried out without the waiver or alteration; and,
- 4. Whenever appropriate, the participants will be provided with additional pertinent information after participation.

Provide justification for requesting a waiver. N/A

Describe how, where, and when informed consent will be obtained from research participants (or permission from parent/s or guardian/s and assent from minor participants), if applicable. CONSENT WILL BE OBTAINED BY SIGNATURE ON CONSENT FORM, WHEN PARTICIPANT AND RESEARCHER MEET FOR SCHEDULED INTERVIEW OR FOCUS GROUP.

Section N: VULNERABLE AND/OR SPECIAL POPULATIONS

- 1. Check if some or all of the targeted participants fall into the following groups. Important Note:** Some targeted populations require compliance with additional Subparts and the completion of an Appendix or of specific section (see last column).

Population Type	Required to Complete
<input type="checkbox"/> Pregnant women, neonates, or fetuses	Appendix for Subpart B
<input type="checkbox"/> Prisoners	Appendix for Subpart C
<input type="checkbox"/> Minors	
<input type="checkbox"/> Mentally-disabled/cognitively-impaired/severe psychological disorders	
<input type="checkbox"/> Physically-disabled	
<input type="checkbox"/> Terminally ill	
<input type="checkbox"/> Economically/educationally-disadvantaged	

☐ A specific group based on religion, race, ethnicity, immigration status, language, or sexual orientation

☐ UGA Psychology Research Pool/Other UGA students/employees

☐ Other (please describe)

2. Explain justification for including the group(s) checked above in this particular study. N/A

3. Is there a working relationship between any researchers and the participants (e.g., PI's own students or employees)?

(Choose YES or NO)

a. If yes, please describe. NO

4. Describe any additional safeguards to protect the rights and welfare of these participants and to minimize any possible coercion or undue influence. For example, amount of payment will be non-coercive for the financially disadvantaged, extra-careful evaluations of participants' understanding of the study, advocates to be involved in the consent process, or use flyers to recruit participants instead of directly approaching own staff or students. N/A

Section O: COLLABORATIVE PROJECT OR OUTSIDE PERFORMANCE SITE

Check one of the two boxes below:

☒ This project does not involve any collaboration with non-UGA researchers or performance in non-UGA facilities.

<input type="checkbox"/> This project involves	Location (County/State/Country)	Authorization/permission letter and/or current IRB approval.	
		<input type="checkbox"/> Attached	<input type="checkbox"/> Pending
		<input type="checkbox"/> Attached	<input type="checkbox"/> Pending

IMPORTANT NOTE: If none of the following applies to your research, this is the END of the application form.

Section P: METHODS AND PROCEDURES THAT REQUIRE ADDITIONAL INFORMATION

Check all that apply. *Important Note: The items listed below are NOT an inclusive list of methods and procedures that may be used in research studies. Some procedures require the completion of an Appendix or of specific sections (see last column).*

Method/Procedure Required to Complete

☒ Student research (For student's thesis/dissertation/others) Section Q (below)

☐ Deception, concealment, or incomplete disclosure Section R (below)

☐ Internet research Section S (below)

☐ Blood sampling/collection Section T (below)

☐ Clinical trial (Drugs, biologics, or devices)

☐ Genetic analyses

☐ Data/Tissue repository

☐ HIPAA (Protected health information)

☐ DXA/X-RAY

☐ MRI/EEG/ECG/NIRS/Ultrasound

☐ Other (please describe)

Section Q: STUDENT RESEARCH

Important Note: The IRB recommends submission for IRB review only after the appropriate committee has conducted the necessary scientific review and approved the research proposal.

1. This application is being submitted for: ☐ Undergraduate Honors Thesis
☒ Doctoral Dissertation Research
☐ Masters Thesis Research ☐ Other (please describe)

2. Has the student's thesis/dissertation committee approved this research? ☒ Yes ☐ No

Section R: DECEPTION, CONCEALMENT, OR INCOMPLETE DISCLOSURE

1. Describe the deception, concealment, or incomplete disclosure; **explain** why it is necessary, and how you will debrief the participants. **Important Note:** The consent form should include the following statement: "In order to make this study a valid one, some information about (my participation or the study) will be withheld until completion of the study."

2. Debriefing Form is attached. ☐ Yes ☐ No; If no, please explain.

Section S: INTERNET RESEARCH

If data will be collected, transmitted, and/or stored via the internet, the level of security should be appropriate to the level of risk. Indicate the measures that will be taken to ensure security of data transmitted over the internet. **Check all that apply.**

- ☐ A mechanism will be used to strip off the IP addresses for data submitted via e-mail.
- ☐ The data will be transmitted in encrypted format.
- ☐ Firewall technology will be used to protect the research computer from unauthorized access.
- ☐ Hardware storing the data will be accessible only to authorized users with log-in privileges.
- ☐ **Other (please describe), or provide additional pertinent information.**

Section T: BLOOD SAMPLING / COLLECTION

If blood will be collected for the purpose of this research, please respond to all the following:

1. **Route/method of collection** (e.g., by finger stick, heel stick, venipuncture):
2. **Frequency of collection** (e.g., 2 times per week, for 3 weeks):
3. **Volume of blood for each collection** (in milliliters):
4. **Total volume to be collected** (in milliliters):
5. **Are participants healthy, non-pregnant adults who weigh at least 110 pounds?** (Choose YES or NO)
 - a. If no, indicate if amount collected will exceed the lesser of 50 ml or 3 ml per kg in an 8-week period and if collection will occur more frequently than 2 times per week.
6. **Will participants fast prior to blood collection(s)?** (Choose YES or NO)
 - a. If yes, describe how informed consent will be obtained prior to fasting.