2022

Looking up: emphasizing vertical development in PC(USA) clergy formation

BOSTON UNIVERSITY

SCHOOL OF THEOLOGY

Project Thesis

LOOKING UP: EMPHASIZING VERTICAL DEVELOPMENT IN PC(USA) CLERGY FORMATION

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Submitted in partial fulfillment of the

requirements for the degree of

Doctor of Ministry

2022

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Dedication

This work is dedicated to my family, whose love encouraged me to follow God's call from the beginning, and to my colleagues in the Presbytery of Donegal who saw a spark of imagination for leadership in me before I knew it was there.

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ABSTRACT

Clergy formation in the Presbyterian Church USA has traditionally focused on rigorous academic preparation for professional ministry, a process now noticeably incomplete as pastors lead through the unique challenges of ministry in 21st century US mainline protestant contexts. This project proposes a way to bridge the formation gap using presbytery-supported peer-learning cohorts for emerging and new pastors with an emphasis on vertical leadership development. Rooted in leadership theory, human development, and adult educational pedagogy, vertically focused cohorts can hone essential leadership and critical thinking capacities amid adaptive change and the complexities of ministry today for clergy and congregational thriving.

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List of Abbreviations (In Alphabetical Order)

ATS – Association of Theological Schools

CLC – Church Leadership Connection

COM – Committee on Ministry

CPE – Clinical Pastoral Education

CPM – Committee on Preparation for Ministry

COTE – Committee on Theological Education

DDO© –Deliberately Developmental Organzations

FTE – Forum for Theological Education (formerly, Fund for Theological Education)

GA – General Assembly

ICF – International Coaching Federation

LDF – Leadership Development Framework

M.Div – Master of Divinity Degree

NFoG – New Form of Government

NRSV – New Revised Standard Version

OGA – Office of the General Assembly

PCUS – Presbyterian Church in the US

PC(USA) – Presbyterian Church in the (U.S.A.)

PMP – Preparation for Ministry Process

UPCUSA – United Presbyterian Church in the (U.S.A.)

VUCA – Volatility, Uncertainty, Complexity, Ambiguity

Introduction

March 8, 2020. I paused before opening the door to my office. Through the wall of windows, I saw the president of our board of trustees, the chair of our congregational safety team, and our associate pastor seated at the oblong table near a large mounted whiteboard. The board was covered in color-coded notes, mostly about the presentation of the consultant-facilitated strategic plan we worked on for months. The congregation received that long-awaited vision at the annual meeting precisely one day earlier. Preparing for a global pandemic had not been on our radar.

On the other side of the office, behind my desk, hung diplomas and certificates in matted, deep red mahogany frames. Two master's degrees from a well-recognized Presbyterian seminary. A Bachelor of Arts with honors from a respected liberal arts college. A certificate of ordination from the Presbyterian Church (U.S.A.) (PCUSA). It was a wall that proclaimed, "this pastor received significant amounts of formal education." As I opened the door, walking past those frames to take my seat at the table I thought, "All that education didn't prepare me for this."

I said that phrase, both to myself and in trusted circles of my clergy colleagues, with some regularity prior to this meeting. My ministry education prepared me well in biblical scholarship, homiletics, and pastoral care. I could write solid Christian education curriculum that followed a scope and a sequence and officiate the sacraments that were "visible signs of God's invisible grace."[1] I could even exegete scripture in Greek and

[1] St. Augustine, quoted in Daniel L. Migliore, *Faith Seeking Understanding: An Introduction to Christian Theology,* 3rd ed. (Grand Rapids, MI: Wm. B. Eerdmans, 2014), 276. ProQuest Ebook Central.

Hebrew (at least I could when I graduated almost ten years earlier). I learned much from the PC(USA) Preparation for Ministry process as it was designed, and I thoroughly enjoyed spending four years immersed in the privilege of a well-equipped residential seminary. I was shaped to minister the way generations of pastors before me had been trained which served their churches well. I walked the same halls and sat in the same classrooms that those pastors and their fathers before me walked. Seminary and the denomination's ministry preparation process taught me how to think like a pastor. Yet, once I was pastoring a congregation, I often felt ill-equipped for the roles and tasks the congregation needed from its pastor as the Presbyterian Church adapts to the rapidly changing landscape of ministry in a 21st century North American context.

In that light, it is not surprising that I, as an academically formed Presbyterian pastor, chose to return to the academy with my questions. I began a Doctor of Ministry program looking to reequip and reengage these challenges with new insight. What could equip pastors better? I realized this question was at the core of my wonderings, the point of convergence for many experiential paths I walked in my first decade of ministry. Remarkably, those paths happened to find a meeting place in a passion to help new clergy thrive as ministers in a 21st century landscape. I currently have the joy of serving as a PC(USA) Pastor, a Presbytery leader, a Christian Educator, and once again, a student of theological education. I try to follow the Holy Spirit's lead as she dances in these different spaces. This project came about when my own experience showed me how hard it was to do this dance well.

I started imagining this project in August 2018, seeking to explore ways that the Presbyterian Church (U.S.A.) might update the way it shapes aspiring clergy to help both pastor and congregation thrive as the church in the 21st century. At the time, I was in my seventh year as a pastor in my first congregational call. Over those seven years, it seemed like my time was consistently occupied by ministry tasks that had nothing to do with what I learned in seminary—capital campaigns to fix collapsing roofs and dilapidated parking lots, staff supervision, and employee manuals, website troubleshooting, and so much more. The things I was trained in—preaching, teaching, pastoral care—were fit in like puzzle pieces around a constant schedule of committee meetings. Over those years a sense of frustration and malaise set in. Was this the ministry I was equipped for and called to do?

Simultaneously, I became a part of a group of newer-to-ministry clergy in my regional presbytery who were struggling with similar challenges. Here I commiserated with colleagues about the parts of ministry we never considered while in seminary—motivating volunteers, budgets and dwindling endowments (or endowments with fortress-like protections around them that were not permitted to be spent), aging buildings, and leaders trying to recreate the glory days when our churches thrived forty years ago. We lamented the general disconnect between what the church wanted to be on the inside and what we thought Jesus was asking the church to be on the outside, serving the world. Over time we realized we did not think the hoops we jumped through with the required multiple-year Preparation for Ministry process equipped us with the skills we needed to meet either the current church's desires or the needs of the world. We tried to share what

we were learning in our congregations and supported each other along the way. This clergy group made a hard road not so lonely to travel.

Initially, I wondered if we were simply missing important skill sets that, if they were taught in seminary or alongside seminary, would solve the problem of high rates of pastor frustration and turnover in ministry. In addition to my own story, I heard those frustrations from my colleagues and through social media networks of pastors. I watched my classmates leave their first calls after two or three years and then transition from second calls as well. Some left ministry altogether. Such experiences were echoed by data that came through my email about the high rate of clergy burnout, including the Barna Group's 2017 study on *The State of Pastors*.[2] At the time, I was finishing a four-year term on the Committee on Preparation for Ministry (CPM) in my presbytery. I wondered about the ethics of sending enthusiastic and passionate candidates for ordination into a vocation we affirmed was God's call for their life, where statistically one in three might not thrive.

This project began by setting out to find what was missing from the already substantial Preparation for Ministry Process that could help new pastors thrive from the beginning of their ministry. My goal was to figure out how to include the newly

[2] *The State of Pastors* study in 2017 found that about 30% of Protestant pastors surveyed were at risk of experiencing burn out. I will occasionally use research from the Barna Group throughout this project, as they are one of the most well-known researchers for conversations on church and culture in the United States. Their data, however, is taken from an ecumenical sample of Protestant, specifically senior pastors. It does not necessarily reflect the unique experience of PC(USA) first call clergy, who may not find themselves in senior pastor roles. For more on *The State of Pastors* study see: The Barna Group in partnership with Pepperdine University, *The State of Pastors: How Today's Faith Leaders are Navigating Life and Leadership in an Age of Complexity* (Ventura, CA: Barna Group, 2017).

identified missing pieces in future PC(USA) pastoral formation so tomorrow's new pastors might be better equipped than my colleagues and I felt. I surmised that because the denomination had poured ample resources into raising awareness on clergy well-being in ministry and self-care, especially for recently ordained clergy, the challenge was not just resiliency—something else was missing. I wondered if it were the skills like non-profit management, conflict resolution, and strategic planning that were absent from clergy education. Maybe intentional leadership development needed a more significant emphasis. Surely the tools existed, and the PC(USA) simply needed to identify them and teach them, filling pastors with more relevant knowledge that could be learned before ordination.

Covid-19 then dramatically changed the ways churches practiced ministry and congregational life. The constant need to pivot, adapt and recreate for not just a season, but for more than a year and continuing, shined a spotlight on clergy, many of whom found themselves stymied by gathering limitations, technology, congregational conflict, community trauma, and so much more. The pandemic accelerated trends that might have taken significantly longer to realize, like the increased use of live-streaming services and hybrid meetings, as well as a rapid drop in what was already declining church attendance.[3] It became increasingly clear that the challenges facing pastors not just during the pandemic, but serving the church in the 21st century, could not be solved by quickly learning new skills every time the ministry landscape changed. The world's

[3] Janet Adamy, "Churches Changed During the Pandemic and Many Aren't Going Back," *The Wall Street Journal*, November 12, 2021, https://www.wsj.com/articles/church-pandemic-covid-online-11636728162.

challenges were too fast and too nebulous for that. Technical solutions cannot solve adaptive problems.[4] We would never be able to keep curriculum and presbytery programs relevant and CPMs updated enough in that mindset. Mid-project, my thinking shifted. If we needed pastors to be more than professional clergy but truly adaptive Christian leaders for wherever God would call the church, what would that preparation for ministry look like?

Nick Petrie, with the Center for Creative Leadership, explains that there are two primary types of leadership development, horizontal and vertical:

> Horizontal development refers to the adding of more knowledge, skills, and competencies. It is about what you know, which we can measure through 360-degree feedback. Vertical development refers to advancement in a person's thinking capability. The outcome of vertical stage development is the ability to think in more complex, systemic, strategic, and interdependent ways.[5]

The elusive skills I initially imagined were missing from PC(USA) clergy formation fall primarily into the category of horizontal development. PC(USA) ministry preparation has focused primarily on horizontal leadership development, and within it overemphasized

[4] Ronald A. Heifetz, Martin Linsky, and Alexander Grashow, *The Practice of Adaptive Leadership: Tools and Tactics for Changing Your Organization and the World* (Boston: Harvard Business Review Press, 2009), 19.

[5] Nick Petrie, "Vertical Leadership Development, Part 1: Developing Leaders for a Complex World," The Center for Creative Leadership, 2014, 8, https://www.nicholaspetrie.com/_files/ugd/a8b141_65db2 99b1e274cdc84e3de48016b9862.pdf. Petrie's work with vertical development is a critical component of this project. At the beginning of my research in 2020, all of Petrie's white papers and research were found on the Center for Creative Leadership's website, www.ccl.org. The original link to this white paper was, https://www.ccl.org/wp-content/uploads/2015/04/VerticalLeadersPart1.pdf. As of March 2022, the document referenced in this footnote and Petrie's other white papers can be found on nicholaspetrie.com.

the transmission of content knowledge limited to historically privileged skillsets, such as biblical exegesis, homiletics, theology, and church history.

Vertical leadership development, however, emphasizes developing leadership capacities for whatever challenge comes along. If horizontal development is pouring knowledge and skills into a cup, vertical development is shaping the vessel itself to be more malleable and ready for whatever it might need to hold.[6] Vertical leadership development is rooted in adult developmental psychology, particularly what some scholars have named "developmental stages of consciousness." Barrett Brown explains:

> Developmental psychologists have identified numerous features of an individual's consciousness, such as cognition (what one is aware of), values (what one considers important), and self-identity (what one identifies with). These features of consciousness develop through recognizable stages, each stage revealing a markedly different understanding of the world. [7]

Vertical leadership development works to intentionally help leaders move through these stages, expand their capacity to hold deep complexities and challenges, and lead themselves and others to thriving amid them. For pastors, vertical leadership development helps increase the possibilities that the pastor and their congregation might live into the fullness and potential of who God created them to be.

The current PC(USA) Ministry Preparation process focuses on transmitting a theological framework, measuring knowledge, and setting a national standard for clergy

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[6] Petrie, "Vertical Leadership Development, Part 1," 8-9.

[7] Barrett C. Brown, "An Overview of Developmental Stages of Consciousness," Integral Institute, April 3, 2006, https://integralwithoutborders.org/sites/default/files/resources/Overview%20of%20Developmental%20Levels.pdf.

readiness. Yet knowledge alone does not fully equip new pastors to lead and thrive in today's congregations. The process inadvertently overlooks much of the vertical dimension of leadership development, which is critical for expanding capacities pastors will need as they face adaptive challenges in the church and denomination daily. This project seeks to incorporate vertical leadership development into the PC(USA) Preparation for Ministry Process to help new and emerging pastors, as well as their congregations thrive in the rapidly changing, complex ministry landscape of the 21st century.

My Context

As a scholar and researcher, I must be transparent about my own connection to this topic and its impact on my ministry context. I am a Minister of Word and Sacrament in the PC(USA), and my own ordination was forged through this Preparation for Ministry Process. My journey into ministry was one that generally fit the mold the process was designed for; a young person who entered the Inquiry Process before graduating from college and was accepted to a PC(USA) affiliated seminary, went to school full-time and thrived in an academic setting. I heard God calling me to ministry at a very young age. I benefited from all the pre-ministry and call-discernment programs offered by the PC(USA) at the time that were created to nurture young Christians into the ordination track to replace the many pastors they expected to retire from pulpits—the ones who had nurtured congregations through the peak of institutional success in the 1970s and 1980s.

Yet, even as one who was "tagged" early, and as I jumped through all the hoops required of me, with acceptable grades, satisfactory assessments, and passing all my

ordination exams, I struggled with the Committee on Preparation for Ministry (CPM) process. I found the long list of the presbytery and denomination's required academic coursework significantly limiting within the course offerings of my seminary. It also restricted how much I could engage my passion in practical theology classes and praxis as part of my Master of Divinity (M.Div.) with all the other requirements in biblical languages and exegesis, theology, and church history. Most of my studies looked backward to the church of the past rather than addressing or even acknowledging the reality of the church today and its future. I finished the M.Div. feeling like I was trained to think like a pastor in a traditional sense, but with minimal experience or confidence that I was prepared to actually do the work of ministry that was needed to serve a church in the 21st century.

Not only was the process cumbersome and feeling incomplete, my experience with my regional CPM was far from ideal. Some members of the committee treated me differently as a female candidate than my male colleagues, even in the early 2000s. They justified such behavior under the auspices of needing to toughen me up for what I would face in a congregation. I experienced firsthand how a process designed historically with national standards to protect traditionally underrepresented voices in ministry, a history I will explore in the next chapter, was both still needed and not effective enough.

When I entered a congregation shortly after seminary, I quickly realized the limits of my seminary education. I was called to a church in the immediate aftermath of a denominational split over theological differences, reducing its rolls from about one thousand members to five hundred when the congregational vote to leave the

denomination failed and the leadership left anyway. My ministerial training did not engage the kinds of conversations that permeated congregations at that time in divisive ways—the welcome of LGBTQ identifying individuals into church leadership and marriage, biblical inherency, and style of worship and music being examples of such issues. Conflict resolution was not a practiced skill, nor were many of the head of staff and non-profit management responsibilities I needed. While I was one of the graduating seniors selected by my seminary for the Transition into Ministry Project, the "Company of New Pastors," I did not find the Company's model for continued formation to address the kind of additional development I needed in this congregation. Programs like the "Company of New Pastors" were specifically created to lessen the noticeably widening gap between seminary and congregational ministry, which I focus on in Chapter Two. Recognizing my need for a different kind of support, I was taken under the wing of several remarkable leaders in my presbytery who were committed to my thriving in ministry and supporting the congregation I was serving at a unique time in its story. I am forever grateful they saw God's call and potential in me.

As I enter my tenth year of ordained ministry, I now serve as a co-pastor of a mid-sized (600 member) east-coast suburban PC(USA) congregation. The congregation mirrors the dominant demographic of the denomination, mostly white middle and upper class and highly educated. This is my second pastoral call, and I served that first church for almost nine years in the same presbytery. My work has focused on transition and change in both congregations, rebuilding systems and infrastructure, and the significant re-empowerment of church leaders. As head of staff, I've initiated writing personnel

policies and rewriting bylaws, delivered news of layoffs to beloved members serving in paid staff roles, managed capital campaigns and budgets, and facilitated vision casting. A fraction of what I do every week was covered in my seminary M.Div experience. The additional CPM requirements did not further my development as a leader, increase my self-awareness, capacity for resilience, or prioritize the essential rhythms of self-care. Most ministry capacities I learned on the job and with the support of my presbytery and through several mid-council and denominational leadership opportunities. As I have served now two congregations through the Covid-19 pandemic, I am acutely aware that the kind of adaptation, resilience, and leadership that is needed to survive ministry in such a time of anxiety and uncertainty was not a priority in, and in many cases was simply absent from, my pastoral formation under the CPM process.

I am intimately familiar with the ins and outs of the CPM process, not only because of my own experience through it, but because I was elected to serve on the presbytery Committee overseeing it after ordination. I sat on the CPM for five years, and in that time was its chair and moderator for three years. I helped modernize our process by updating documentation and making our resources accessible online. I walked with candidates through those same hoops that I navigated and tried to nurture the committee to see their role as partners in preparation rather than gatekeepers. When we prayerfully discerned the committee was not hearing God's call to ordination for a few candidates, we tried to support them with the resources they needed to pursue God's mission in ways that were a better fit for their gifts and unique situation.

After finishing my terms on CPM, I now sit on the Commission on Ministry (COM), which is the presbytery group that works with congregations and their pastors. In my time on COM I have seen several pastors struggle with the disconnect between their ministerial training and the work they are being asked to do daily. The dissatisfaction and burnout rate is high, especially among those who are less than fifteen years ordained. The pandemic has pushed those who were barely keeping their "head above water" to a metaphorical sense of drowning. Several seasoned pastors close to retirement before the pandemic have taken this opportunity to depart, sensing a new age of ministry upon us that calls for different skill sets than they cultivated in their tenure.

As part of my own formation, and as a way to support my colleagues within the presbytery, I am a founding member of the NewLead Pastor's Cohort. This is a group that began with the support of our Executive Presbyter and Stated Clerk for, in their own words, "those who are new-er to ministry and those who want to think in new ways about ministry." They invited me to help initiate the cohort in its infant stage in 2015. I now resource it as a coordinator. My early ministry has benefited greatly from the group, the holding environment it created, and the mentorship of the Presbytery's leaders. My project adapts their cohort model to directly address the gaps in the Preparation for Ministry process, provides scaffolding for its implementation, and puts it in dialogue with Vertical Leadership Theory.

There is one other path I have been journeying that meets at this juncture of interest in the Preparation for Ministry Process. I have had the privilege of serving as the co-chair of the PC(USA)'s General Assembly Special Committee on the Reformed

Perspective on Christian Education in the 21st Century. This group was formed by the 222th General Assembly to study and make recommendations on the unique perspective of Reformed churches on Christian education in today's ecclesial landscape. Its goal is to point the denomination towards supporting and resourcing Christian education efforts effective at raising mature Christian disciples in the PC(USA) across generations. Appointed by the co-moderators in early 2017, our team of between eight and fourteen people, depending on the year, researched what congregations needed in their local contexts to do Christian formation and what best practices we could offer. Our work resulted in recommendations on intergenerational ministry and resources that were easily picked up by church leaders without a theological education. It included recommendations for small churches and the unique needs of racial/ethnic congregations who are virtually unrepresented in past PC(USA) curricula. We revised our recommendations for the 225th (2022) General Assembly for changes mid- and post-pandemic, and concludes the work of our special committee.

Most importantly for this project, our special committee work noted the absence of training pastors receive to be Christian educators and to support lay leaders in equipping disciples. It once again opened my eyes to how formation in the church was designed in the era of institutional education mirrored to look like a classroom and impart that horizontal knowledge of scripture, theology, and Christian disciplines into the vessels of Christ's disciples. I also realized that many PC(USA) pastors expected to have trained Christian educators to do that work alongside them, and we no longer live in a day and age where that is the norm. Pastors now need to add Christian formation to their

increasingly long repertoire of what they can offer congregations. But we as a denomination are not resourcing them to do so.

These various experiences and this place where they intersect have led me to realize that how we shape our pastors for ministry profoundly matters. It matters for pastors' holistic wellbeing that we set them up to thrive in ministry. It matters for congregations that pastors can both meet a standard of expectation for their congregation while simultaneously leading them into a future that follows the Holy Spirit who is not bound by human time expectations or the institutions people build. Preparing pastors for ministry in the 21st century matters because God's word is still active and at work, and the world aches to see the hope and promise of the Gospel in new ways.

Choreography of this Project

In this project I use the metaphor of a dance to describe PC(USA)'s Preparation for Ministry Process with all its steps, contributors, and partners. I argue that the complexities and competing values intrinsic to the process make it difficult for pastors to move seamlessly from candidacy to ordination. The goal of this project is to bridge those gaps so that pastors are better equipped to follow the Holy Spirit as they lead congregations in this new ministry landscape, whatever challenges they will face.

In Chapter One, I look at the PC(USA)'s Preparation for Ministry Process through a historical lens. I draw on Ted Smith's research with the Theological Education Between the Times project in partnership with Candler School of Theology at Emory University and the Lilly Endowment. Smith notes three major transitions in American clergy identity

since colonial America.[8] Colonial America saw pastors as part of the standing social order and who played a distinct role in civil society. Clergy formation at that time was shaped to uphold those values by educating pastors in established schools for pastors, lawyers, and other civil servants. After the American Revolution, the role of the church shifted as people could choose what congregation to be a part of based on shared values—ushering in the Age of Association. Clergy became professionals in the Age of Association, and their education adapted to that of other professional trades with distinct academic formation. The Age of Association began to break down at the end of the 20th century and is shaping into what is now called the Age of Authenticity. However, the church has not yet fully adapted to this new age, nor has clergy formation in the PC(USA). In this chapter, I put Smith's work in dialogue with others studying the cultural shift occurring in mainline Christian denominations in the United States. I weave this cultural shift with PC(USA) history and the PC(USA) Preparation for Ministry Process, offering that to maintain the way we educate and form pastors for today's church is to equip them to lead a church of the past, one that no longer meets the needs of the time and culture we live in today. This is, I believe, one significant root of the problem with the current Preparation for Ministry Process.

Chapter Two dives into adaptive leadership and vertical leadership development. I explore the foundations of vertical development, and how it is different than horizontal

[8] Ted Smith, "No Longer Shall They Teach One Another: The End of Theological Education, Lecture 1: Consolidation," The Sprunt Lectures, Union Theological Seminary, May 3, 2021, https://www.youtube.com/watch?v=i_9peSje2HQ.

development—the development that is measured through most traditional professional education and much of the Preparation for Ministry Process. I begin the chapter by reviewing adaptive leadership and its importance as PC(USA) congregations navigate this liminal time and move into the future. I then offer a brief overview of horizontal and vertical leadership development and explain how vertical development is missing from areas of the Preparation for Ministry Process that are functionally emphasized. I also address the psychology that undergirds vertical leadership development and why it is important for leaders in times of complexity and change. The chapter concludes with a look at recent transition into ministry programs supported by the PC(USA) and offers that vertical leadership development is still excluded from the newly developed programs intended to help pastors beyond seminary and bridge the known gaps in their formation.

In the third chapter, I explore biblical examples of vertical leadership development, specifically through Jesus' formation of the disciples. Using Mark's two feeding narratives as case studies, scripture offers examples of Jesus calling the disciples into situations that are fertile for shaping both their horizontal and vertical leadership development as part of their vocational journeys. I also write about some of the theological implications of vertical leadership development and how it can help pastors and their congregations be more in tune to the dance of the Holy Spirit among them in the new ways she is speaking today.

In Chapter Four, I propose a way to integrate vertical leadership development into the Preparation for Ministry Process and sustain it through a pastor's early career formation by developing self-directed peer-learning cohorts at the Presbytery level. I

explain why I have designed the cohorts to include the time between seminary and first or second call experiences and why the element of a self-directed peer learning process is important. I also address why the Presbytery is not only a natural place, but an ideal place, for a cohort like this to be situated. I then offer ways these cohorts can be evaluated to determine if they are nurturing vertical development successfully, and if the addition of vertical development enhances clergy thriving in early career contexts. While this program is not intended to be a solution to the whole challenge of clergy formation in the PC(USA), it seeks to offer a way to bridge the gaps in the process while the denomination and seminaries continue to adapt their own thought processes, goals, and systems to be more responsive to the needs of the 21st century church.

In the final chapter, I summarize the work of the previous chapters and address implementation concerns and possible limitations of the cohort design as laid out in Chapter Four. I argue that to do nothing in the face of known gaps in pastoral formation will be detrimental to the futures of pastors, congregations, presbyteries, and their collective witness. I conclude by offering my thoughts on how this program can create possibilities and hope for PC(USA) pastors challenged to minister in a rapidly changing cultural paradigm compounded by a sustained pandemic and fractured political climate.

The Barna Group released new data from an updated clergy wellbeing study on November 16, 2021, as I neared the completion of my writing on this project. It stated that 46% of pastors it surveyed under the age of 45 are considering quitting full-time ministry. It also claims that 51% of pastors from mainline denominations are considering

quitting, a category that includes PC(USA) congregations. The article highlights the extreme stress the pandemic has added to already strained pastors. Kinnaman states:

> We started seeing early warning signs of burnout among pastors before COVID… Now, after 18 months of the pandemic, along with intense congregational divisions and financial strain, an alarming percentage of pastors is experiencing significant burnout, driving them to seriously consider leaving ministry… More than ever, the church needs resilient leaders who are humble, agile, rooted in prayer, and who are committed to being healthy as an essential aspect of effective leadership.[9]

This research notes the increased challenges to younger, and presumably newer to ministry, pastors in mainline denominations. These are challenges the PC(USA) began noticing in recent decades but have reached a critical peak during the pandemic. PC(USA) pastors entering ministry now deserve a chance to develop the leadership capacities they need as they begin ordained ministry, so we are not sending them knowingly unprepared for the challenges of leading PC(USA) congregations today. As demonstrated by our Presbyterian history and the Biblical narratives, the church has experienced change and challenges before. God is still faithful. The Holy Spirit's dance continues, even if we look in the wrong direction. Vertical leadership development supported by Presbytery cohorts offers a way for the PC(USA) to bridge the gaps in the current Preparation for Ministry Process while the church and academy reimagine formation to respond to God's call in the 21st century. It calls us to look up—to new

[9] "38% of U.S. Pastors Have Thought About Quitting Full-Time Ministry in the Past Year," The Barna Group, November 16, 2021, https://www.barna.com/research/pastors-well-being/.

ways of thinking and with optimism. For the wellbeing of both pastors and congregations, we cannot afford to wait.

Chapter 1

The Preparation for Ministry Dance:

Professional Formation for the Age of Association

The Covid-19 pandemic brought the challenges of preparing Presbyterian Church U.S.A clergy for ministry in the 21st century into the spotlight. While pandemic response and mitigation protocol varied by region, pastors in the metro New York to Washington DC corridor where I serve navigated ministry beyond buildings significantly longer than anticipated. Sessions moderated by their pastors made the unthinkable decision to close sanctuaries in March of 2020, alongside schools, businesses, and virtually all but grocery stores and healthcare. We naively thought we would return to church buildings in a few short weeks, with ample time to prepare for grand Easter celebrations. How very wrong we were.

We celebrated our first Holy Week and Easter virtually, sharing the Eucharist across Zoom screens. Our congregation shared a bread recipe we each made at home to help us represent the one loaf we would have shared around the sanctuary's communion table. Pastoral care was limited to telephone, handwritten notes, and the occasional video chat. As the weather warmed, we worshipped masked outdoors and held office hours on the lawn as weather permitted. Beyond our wildest imaginations, many church doors still remained shut eight months later on Christmas Eve due to pandemic spikes. Those were dark and silent nights, where the hope of Emmanuel and God's promise amidst widespread illness, death, and radically disrupted lives was needed in tangible ways.

While God remained steadfast, so much of how the church in the 21st century operated and thought about itself needed instant adaptation.

Generations of churchgoers were conditioned to see church buildings as places to go to make meaning and connect to God in times of crisis. The very word sanctuary is grounded in meaning of safety and refuge. Religious service attendance spiked in the United States after the national crisis of the September 11, 2001 terrorist attacks, even amid decades long decline of church participation. While the trend did not last more than a few weeks, Mark Chaves notes people associated churches as places to seek "refuge, community, and a place to grieve."[10] In times of acute crisis or major events, people have traditionally gathered in churches to find comfort, hope, and to make meaning.

But amid pandemic, closed church doors were a visible sign of the barrier to doing ministry in the ways so many PC(USA) churches had always operated. Gathering as community was a cornerstone of Christian practice and an "if you build it they will come" philosophy that had once worked for many in the mainline church. Many congregations pre-pandemic still functioned under such pretense. Church buildings, and the worship and community life that happened within church walls made meaning in people's lives. In pandemic, pastors wrestled with contradictory values—keep the community safe through distance while simultaneously showing up as the church for the community in crisis. Equipping for faith at home and faith beyond Sunday morning took

[10]Mark Ferreri, "After 9/11, A Short-Lived Rush to Church: Mark Chaves on How Church Business Boomed Briefly After 9/11," *Duke Today, Academics*, August 19, 2016. https://today.duke.edu/2016/08/after-911-short-lived-rush-church.

on new meaning. The phrase "seminary didn't prepare me for this," became a desperate mantra for friends and colleagues in my clergy networks who faced impossible decision after impossible decision beset in the polarized political landscape of the day. Each decision our leadership bodies made was sure to disappoint a least a portion of our congregations. Nothing functioned normally. This was not the work for which we were trained.

Of course, we who uttered those words never expected our seminaries to have a class in preparing for ministry in a global pandemic. PC(USA) churches were not alone. Most faith communities did not have pandemic response plans as part of emergency protocol prior to 2020. Such tragedies were the plots of dystopian movies. Instead, in 2020, organizational leaders of all flavors—churches, schools, businesses, even hospitals—were truly "building the plane while flying it."

However, additional challenges surfaced for pastors during the pandemic that were not new to 2020: keeping up with communication technology, offering meaningful pastoral presence in a virtual world, responding to communities fractured along political and ideological lines, admitting the racial injustice in our midst, fostering leadership endurance in an ongoing crisis, even helping congregations think theologically for the future and beyond a building. These challenges are not exclusively challenges for pandemic ministry—but the pandemic highlighted, expedited, and reinforced these challenges as critical issues that pastors can no longer ignore or wait to address at a more convenient time. Yet, our vocational training has not adapted to equip pastors to take on these critical tasks as part of the formal ministry formation process. The Covid-19

pandemic may be the long-needed catalyst inviting the PC(USA) to introspective work and honesty about ministry in its purpose, form, and function. It is now easier to see the widening gap between the clergy skills and capacities needed to lead the church today, compared to a past iteration of church the PC(USA) Preparation for Ministry process was designed to serve.

The PC(USA) Preparation for Ministry Process and Its Dance

Up to this point, I have used language for seminaries and the PC(USA)'s Preparation for Ministry (PMP) process interchangeably. In the minds of all but the most polity conscious Presbyterians and those knee-deep in the call and discernment process themselves, seminary is understood to be where ministry preparation takes place. Moving forward, for the purposes of this project, it is important to understand them as interconnected but distinct entities for Presbyterians. Seminaries, and the Master of Divinity Degrees (M.Div.) they confer, are one piece (albeit an important piece) of pastoral formation. There is a more thorough ecclesial process, which tends to more than academic preparation, overseen by the PC(USA) General Assembly's Preparation for Ministry Process which is implemented by a local presbytery. The multifaceted and complex accountability structure of the process contributes to challenges in the holistic and relevant formation of pastors today.

Today, PC(USA) preparation for ministry as a Minister of Word and Sacrament and Teaching Elder relies on a carefully choreographed dance between aspiring pastors, ecclesial bodies, and academic institutions that has changed little since the PC(USA) was

incorporated in 1983.[11] It is a dance that emerged out of a long history and a constant tension between the academic and the practical, between upholding accepted ecclesial and institutional standards against the contextual realities of the times. And, as with most honest histories, it reveals the Presbyterian imperfect struggle with power as church leaders looked to the future while still holding onto the past.

The following steps are part of today's preparation for ministry dance. Local churches affirm God's potential call in individual members. Presbyteries, the regional governing body of local churches, shepherd individuals through the preparation process as determined by General Assembly (the PC(USA)'s highest governing body) standards. The General Assembly points to outcomes for readiness, while setting those denomination-wide standards and an evaluation and examination process. Seminaries and theological schools, accountable to institutional vision and accreditation requirements, in addition to their denominational affiliation and increasingly diverse student body, educate and confer Master of Divinity degrees required for minister ordination. For the holistic formation of pastors, each body must be in sync with the Holy Spirit and each other. But with that many entities, the dance becomes complex. Too many choreographers are teaching isolated dance steps, leaving the ministry candidate missing the practical moves that link one part of the routine to the other. Without those moves, they struggle to execute the dance as whole. The gaps between steps often leave emerging and new

[11] The PC(USA) uses the phrases Ministers of Word and Sacrament and Teaching Elder interchangeably. There is no distinction between the two—they are the same office.

pastors struggling to move from what they know about ministry to the practice of ministry today.

Clergy Education in Dialogue with US Presbyterian History

How did it get to be this way? The history of Presbyterians in the United States is marked by moments of significant focus on clergy education and formation as needs of the church and culture shifted throughout American history. Presbyterians throughout that history celebrate a commitment to education and learning, not just among its leaders but also as a mission focus at home and abroad. Historically, Presbyterians strive for Anslem's vision of a faith seeking understanding, which at its best engages faith critically with the mind to transform one's heart to love God and serve God's world.[12] That commitment to education begins with those who preach, teach, and serve the church. But tension, controversy, and even schism punctuate the story of Presbyterian clergy formation. To continue adapting the clergy formation dance to faithfully follow the choreography and rhythm of the Holy Spirit as she leads into the future, it is important to understand the history that contributed to where we are today.

Presbyterian Clergy Education from Colonial America – Civil Rights Era

A focus on Presbyterian clergy formation in North America began before the American Revolution. Rev. Dr. Ted Smith, in his work with the Theological Education Between the Times project, explains that Protestant churches in Colonial America had a desire to be a part of the "standing order...dreams shaped by the established churches in

[12] Migliore, *Faith Seeking,* 3.

Europe."[13] He says that the standing order was in reality "a tight network of ecclesial, political and economic powers" where church, laws, taxes, community rhythms, and even public schools were all intertwined.[14] Clergy had a role that was both religious and civil in this system.[15]

Pastors supporting Protestant churches in the colonies were initially trained either in Europe, and then came across the Atlantic, or in the few established colleges in the colonies. Ministry candidates learned classics and intellectual ideas in addition to scripture and theology alongside those studying as lawyers and government officials. Ministers were sent into an ordered vocation that was integrated into the fabric of civil life. They were trained by people who were invested in keeping the church and society functioning in symbiotic ways.

Church leaders were invested in the who, what, and where of theological education in early American life because the ideas and values that were nurtured in clergy through their education impacted far more than lives of those in a local parish or individual congregation. Yet, any formal ministerial education was hard to access because schools were so few in the colonies (limited almost exclusively to Harvard and

[13] Smith, "No Longer, Lecture 1: Consolidation."

[14] Smith, "No Longer, Lecture 1: Consolidation."

[15] The "Theological Education Between the Times" project is an initiative of Candler Theological Seminary at Emory University, funded by the Lilly Endowment, and directed by Dr. Ted Smith. A project in three phases, begun in 2014 and set to finish in 2023, it seeks to gather diverse practitioners to think critically and theologically about theological education as the field changes. (https://tebt.candler.emory.edu/about and https://candler.emory.edu/news/releases/2020/12/theological-education-between-the-times.html)

Yale established by the New England Puritans, and a few schools founded by the Anglicans).[16]

As the colonies expanded, networks of Presbyterian congregations were established. Presbyteries and synods formed to further structure the Presbyterian community. A pressing initial issue for these new councils became developing a standard of ordination across adjudicatories. With the Adopting Act of 1729, a singular standard was set that all Presbyterian pastors ordained must agree to the tenants of the Westminster Confession of Faith.[17] Concurrently, Irish Presbyterian minister, William Tennent, founded a "log college" in 1718 to equip pastors locally, beyond these traditional schools. He recognized the barriers for prospective Presbyterian pastors to access formal education. A question arose: what accountability would schools, like Tennent's, outside the traditional system have as they shaped pastors to lead these young communities?

Some leaders felt adherence to the Westminster Confession alone did not go far enough in maintaining a standard for ordination, especially with the rise of clergy trained beyond those traditionally accepted schools, and in 1737 the synod tightened ordination requirements by "ban[ning] itinerant preaching and add[ing] the requirement that new

[16] Blair, "More Than a Log College: Clergy Education and the 18th Century Presbyterian Revivals," *The Journal of Presbyterian History* 93, no. 2 (2015): 52, http://www.jstor.org/stable/24717289.

[17] Paul Matzko, "Adopting Act of Westminster Confession," The Association of Religion Data Archives, accessed October 31, 2021, https://www.thearda.com/timeline/events/event_228.asp.

ministers must have a degree from an officially-chartered college like Harvard, Yale, or one of the European schools."[18]

The Synod's action establishing ordination standards divided colonial Presbyterians who adhered to the "Old Side" of ministerial training and standards for ordination, and those who, like Tennent, saw pastoral formation from a "New Side" pushing back against rigid intellectualism and the institution. Tony Blair notes:

> The Old and New Sides had different visions of the parish, which translated into different visions of the community: the Old Side continued to define community by geographical boundaries while the New Side stepped boldly into the concept of voluntary association. They had varying ideas about the role and purpose of leadership: the Old Side preferred the traditional hierarchy of the Old World while the New Side embraced, perhaps unconsciously, a more democratic ideal in which ordinary people chose their own authorities… While there were a number of underlying issues, none was as important as the intellectual foundations which clergy brought to their ministry. In the 1730s, this debate crystalized into the specific issue of whether a minister should acquire a formal degree at an established university, or whether it was possible to be adequately trained in a small colonial academy.[19]

The Association of Religion Data Archives notes, "The Old Side-New Side controversy had lasting consequences for American religious history. It returned substantial authority to presbyteries vs. synodical authority, a pattern that persisted until the 20th century. More importantly, the emergence of the New Side faction substantially aided the advance of the First Great Awakening."[20] Ordination standards became an attempt to regulate pastors swept up by the zeal of the First Great Awakening. Debates over the most

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[18] Paul Matzko, "The Synod of 1737 and the Old Side New Side Controversy," The Association of Religion Data Archives, accessed October 31, 2021, https://www.thearda.com/timeline/events/event_229.asp.

[19] Blair, "More than a Log College," 54.

[20] Matsko, "The Synod of 1739."

effective way to educate clergy responsive to cultural realities of the day punctuate Presbyterian history from its earliest roots in the United States.

Smith explains that with the American Revolution came an unraveling of any sense of a standing order in the new United States. After the revolution, churches of all denominational affiliations experienced a shift from village churches to voluntary societies with membership and affiliations.[21] One's church was no longer determined by the community in which a family settled, but rather a choice to join a congregation that shared one's own identity and values. At the same time, James Smylie explains, "During those early years of the nineteenth century, Presbyterians helped shape a 'benevolent empire' which existed alongside denomination structures. These societies drew together individuals who wanted to encourage educational, missionary, and reforming work among Christians."[22] A parallel shift occurred in the role of clergy from an office of the church and state to a that of a distinct profession. With this shift, 19th century Presbyterian theological education was moved out of the classical undergraduate university and relocated into focused seminaries and university adjunct divinity schools aimed with shaping clergy both academically and for performing the functions of ministry within a congregational setting.

Accreditation boards and professional guilds emerged and supported this professionalization in the 19th century.[23] Presbyterian seminaries like Union and

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[21] Smith, "No Longer, Lecture 1: Consolidation."

[22] James H. Smylie, *A Brief History of the Presbyterians* (Louisville, KY: Geneva, 1996), 73-74.

[23] Smith, "No Longer, Lecture 1: Consolidation."

Princeton (which grew out of Tennent's Log College) formed to specifically shape ministry candidates for the profession of ministry within the framework of higher education. Charles Foster and his colleagues write in *Educating Clergy* (a volume of the Preparation for the Profession series of the Carnegie Foundation):

> A distinguishing feature of professional education is the emphasis on forming students in the dispositions, habits, knowledge, and skills that cohere in professional identity and practice, commitments, and integrity. The pedagogies that clergy educators use toward that purpose—formation—originate in the deepest intentions for professional service—for doctors and nurses, healing; for lawyers, social order and justice; for teachers, learning; and for clergy, engaging in the mystery of human existence.[24]

The challenge is creating a framework where that pedagogy can thrive and adapt to the changing realties of the profession. William Sullivan notes, "professional education is a cognitive or intellectual apprenticeship, a practical apprenticeship of skill, and an apprenticeship of identity formation. The academic setting, however, clearly tilts the balance toward the cognitive." As the Presbyterian Church moved the formation of its pastors into the academy, disciplines of theological education emerged that slowly became bifurcated from the practice of ministry in congregations. Presbyteries were responsible for the vocational formation of aspiring pastors (practical), while seminaries and divinity schools took care of the academic (cognitive). Preparation for congregational ministry increasingly found itself relegated to these areas in the academy. For Presbyterians, practical theology and praxis became less and less the focus of the Master

[24] Charles Foster et al., *Educating Clergy: Teaching Practices and Pastoral Imagination* (Stanford, CA: Jossey Bass, 2006), 5.

of Divinity degree, and more the responsibility of the regional body to support that formation and evaluate readiness.

The Struggle for Standardization of Presbyterian Ministerial Education

With professionalization comes a need for standardization. Institutions that develop around professional identity must hold those who take on that role accountable to the function of the profession as well as desired image they seek to cultivate as part of society. As clergy education adapted to professionalization, Presbyterians continued to hold different opinions about the who, what, and where of clergy education and the preparation for ministry process.

An example of this difference emerged in the height of the Second Great Awakening. As Presbyterians expanded west, widely successful revivals in Kentucky and along the frontier created a need for pastors of new churches more quickly than they could be trained. A tension arose—as pastoral candidates left the frontier communities to go east to seminary, many chose not to return west. Questioning the efficacy of the strict need to educate in established theological schools, "the newly organized Synod of Kentucky ordained uneducated ministers in violation of the denominations rules."[25] When they were rebuked by the General Assembly, the rebel group split off and formed the Cumberland Presbyterian Church, still today a denominational cousin to the PC(USA). The remaining churches held to the formalized education in seminaries and university adjacent theological schools.

[25]Paul Matzko, "Cumberland Presbyterian Church," The Association of Religion Data Archives, accessed October 31, 2021, https://www.thearda.com/timeline/events/event_242.asp.

Presbyterian history through the nineteenth and twentieth centuries is marked by further division and reunification around leadership, theological interpretation, and social issues such as women's ordination, slavery, and civil rights. While education of clergy was not at the forefront of these controversies, ordination processes and educational institutions continued to play a role in what theological positions were considered normative and within the bounds of denominational standards at various times. Who taught, what they taught, and how they taught shaped the theological imaginations of pastors, who then brought those teachings back to their congregations. Values around ordination of women, slavery, and other social justice movements differed based on geography and culture. These values formed and informed theological education in regional seminaries, as well as highlighted a need for standardized processes across geographical areas.

Historically, Presbyteries had sole responsibility to determine a candidate's readiness for ministry beyond the seminary degree. Each Presbytery shepherded candidates through theological education and then determined a candidate's readiness for ministry by oral examinations on the floor of a Presbytery meeting.[26] Approval for ordination was obtained with an affirmative vote of the assembled Presbytery body. The social climate of the 1960s awakened some Presbyterians to see the need for a more objective and national standard to determine readiness for ordination. Denominationally administered standard ordination exams were born.

[26] Timothy Cargal, conversation with author, August 6, 2021. Cargal shared much of the history of the ordination exams and Preparation for Ministry process contained in this chapter.

The Rev. Dr. Timothy Cargal, the Assistant Stated Clerk for Ministry Preparation and Support for the PC(USA) Office of the General Assembly, notes that there were fundamentally different reasons for the northern church and the southern church to implement written standard ordination exams. In the United Presbyterian Church in the U.S.A. (UPCUSA), churches primarily in the north and west, where the exams first began in the 1960s, the primary motivation for the exams was to create a baseline and institute fairness across presbyteries. As women and people of color sought ordination in a presbyterian denomination dominated by white, male leaders, the examinations intended to show that once a candidate completed the requirements necessary to be offered examination on the floor of the presbytery, they, regardless of their gender or race, already demonstrated the academic capacity and the ability to integrate their knowledge of ministry into practice, at least in written form. The PC(USA) Handbook on Ordination Examinations states:

> An overture from the Presbytery of San Francisco to the General Assembly of the United Presbyterian Church in the United States of America in 1963 set in motion the ordination exams. Their purpose, as stated in the overture referred to the presbyteries for study and comment the following year, was "to provide a more equitable standard of expectation among all the presbyteries, and to offer candidates a more equitable basis for their preparation for ordination examination." The provision of the constitution of the predecessor United Presbyterian Church in the United States of America requiring standard ordination examinations took effect in 1965. Examinations have been given continuously (in the UPCUSA stream) since 1967.[27]

[27] Presbyteries' Cooperative Committee on Examinations, *Handbook on Standard Ordination Exams* 3.1, (Louisville, KY: Mid Council Ministries of the Office of the General Assembly of the Presbyterian Church USA, 2021), 2, http://pcusa.org/site_media/media/uploads/prep4min/pdfs/exam_handbook_2021_rel_3-1.pdf.

The goal of the ordination exams was to both open access to those who might otherwise be unfairly challenged on the floor of a presbytery, and to keep those who did not demonstrate readiness for ministry from coming to the floor at all.

Presbyterian Church in the US (PCUS), primarily churches in the south, had a different motivation for instituting standard ordination exams—a more theological focus and a check on the seminaries to keep their teaching rigorously orthodox. Cargal notes that during the peak of the Vietnam War, enrollment in seminaries increased as dissenting men pursued theological education and church work in lieu of the draft. The PCUS sought a standard of accountability of preparation and orthodoxy for both graduates and the seminaries conferring degrees on ministry candidates. The differences in regional and local theologies, combined with the historical shaping of Presbyterian theological education thoroughly rooted in the institutionalization and professionalization of the church for the hundred years leading up to reunification set the stage for the creation of the PC(USA)'s ordination standards as they exist today.

The PC(USA) and Its Clergy Formation Process Today

The PC(USA) as a denomination was formed when the Presbyterian Church in the United States reunited with the United Presbyterian Church in the United States of America in 1983. While the two denominations came with different histories and sometimes competing priorities, the preparation for ministry process itself was remarkably uncontested. The first *Book of Order* for the reunified church contained

fourteen pages of a prescripted preparation for ministry process, with requirements for ordination.[28] It included:

- A minimum two year, two phase (inquiry and candidacy) process overseen by the Presbytery's Committee on Preparation for Ministry: a body elected by the presbytery with equal representation of ruling and teaching elders.

- A list of five required demonstratable marks for readiness for ministry—including agreement with the church's confessions, personal integrity, and spiritual maturity.
- Educational (undergraduate) degrees from a regionally accredited college or university.

- A Master of Divinity from an Association of Theological Schools (ATS) accredited seminary with evidence of Hebrew, Greek, and exegesis of Old and New Testaments in the original languages on the transcript.

- Satisfactory grades on the five Presbytery Cooperative Committee on Examinations exams covering biblical exegesis, bible content, theological competence, worship and sacraments, and church polity.[29]

Despite the differences in reasons for standard examinations, and a history where clergy educational standards drove Presbyterians apart, Cargal notes a joint committee between the two denominations came together to create and administer the five standard ordination exams, about seven years before unification even occurred. Their collaboration led the way for clarity and process for clergy formation in the newly reunited denomination.

[28] The *Book of Order* is part two of the PC(USA)'s constitution. It contains theological foundations for ministry, the form of government, the directory for worship, and a section on ecclesial discipline. The Preparation for Ministry process is found in section G (Form of Government).

[29] Offices of the General Assembly of the Presbyterian Church (U.S.A.), *The Constitution of the Presbyterian Church U.S.A Part II: The Book of Order 1983-1985:* (New York: Stated Clerk of the General Assembly of the Presbyterian Church US, 1983), G.14-14.0300-14.0406.

When a process is designed with such a complex history and multiple values to uphold, the process can take on a life of its own, sometimes overshadowing the desired outcomes of that process as an organization's needs shift over time. The Preparation for Ministry Process requirements, and desired outcomes have changed little since they were instituted in the first *Book of Order* after reunification in 1983. Yet, the experience of church in the 21st century and what is being asked of clergy in their roles as congregational leaders has changed dramatically. As American experience and religiosity shifts from an age of voluntary association and institutionalization to the Age of Authenticity and more individual expressions of belief and meaning making, it is surprising that the goals and outcomes of pastoral preparation for ministry have not adapted to this change. Many pastors are still being formed to lead congregations as they were in the height of church institutional prowess years ago.

What has shifted in the Preparation for Ministry Process are the ways in which presbyteries are permitted to measure that readiness and a less rigid process to achieve the outcomes. The initial approach, contained in the fourteen pages of G-14.0400 in the PC(USA)'s original form of government, is written in significant detail. It includes specifics such as the questions a Presbytery Committee on Preparation for Ministry (CPM) is to ask an inquirer at the annual meeting during their first year of theological education, and a continuing education plan that must be shown before receiving approval

for ordination.[30, 31] The detailed process provided clarity and continuity. It worked well for those who fit the expected mold of minster as professional in that day—a first career young person, typically male, able to excel in the academy as a full-time higher education student, geographically mobile, and on track to be called into a full-time installed ministry position with a livable wage, benefits and pension.[32] The challenge today is that this expected mold is no longer the only mold, the desired mold, or even sometimes the possible mold, for pastors in the 21st century.

Statistics now demonstrate that the previously normative, young inquirer beginning the CPM process before starting seminary, is now one profile variation among many as diverse people hear God's call to ordained ministry. Frank Spencer, the

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[30] The Office of the General Assembly of the Presbyterian Church (U.S.A.), *The Book of Order 2007-2009: The Constitution of the Presbyterian Church USA Part II* (Lousiville: The Office of the General Assembly, 2007), G-14.0305.

[31] Instead of using chronological numbers, *The Book of Order* uses an alternate system of pagination to identify the location of content within the document. One of four letters (F-foundations, G-government, W-worship, D-discipline) is followed by a number for a topic and then a decimal to note subcategories within that topic. In the case of the citation above this means the fourteen pages of requirements are location in the chapter on the Form of Government (G), paragraph fourteen (14), item 0305. This is done for continuity across time as the *Book of Order* can be edited by the General Assembly each time it meets (currently biannually).

[32] In the PC(USA) installed calls are the positions that are considered long-term jobs with the protection of the Presbytery. They are also required to offer the full Board of Pensions benefits package. These positions are currently highly coveted in the denomination and are not as abundant as they once were. Multiple studies by the denomination over the last 30 years have demonstrated that the installed calls have been disproportionally occupied by white men. Women and people of color are more likely to be called as temporary, transitional, interim, and other non-installed positions that generally less stable, pay less, and are not required to participate in the denomination's generous benefit and pension package. As the demographics of pastoral leaders diversifies, this disparity in access to installed calls, and the financial protections that come with them, contribute to yet another challenge for clergy education in the 21st century that will not otherwise be addressed in this project—the high cost of undergraduate and seminary education (both required by the current ordination process) and the debt new pastors struggle to pay on only congregational compensation. See Frank Spencer, "Hope and Challenge: Vocation within the PC(USA)," *The Presbyterian Outlook*, May 30, 2018, accessed September 2, 2021, https://pres-outlook.org/2018/05/hope-and-challenge-vocation-within-the-pcusa/.

president of the Board of Pensions of the PC(USA) notes that between 2007 and 2016, the average age of ministers at ordination was 39.1, revealing the number of individuals hearing calls as second, third, and even post-retirement careers. Of those individuals ordained more were women than men (52%/48%), a dramatic shift from when this formation process was instituted.[33] In 2005 women only made up 21% of all pastors in the PC(USA) more than 20 years after reunification.[34] Further, about one fourth of candidates and inquirers identify as persons of color, compared to a denomination whose membership is 90% white. Many enter the CPM process only after completing seminary, not before or concurrent as the process was designed. Others take seminary courses part-time over the course of many years and more are accessing theological education online as compared to full-time and residential seminaries. As the landscape of ministry shifts and as a normative mold of an inquirer/candidate disappears, emphases of the PC(USA) Preparation for Ministry need to adapt.

Adapting to More than Technical Change

Not only does the Preparation for Ministry process need adapting, but the required content has not been sufficiently updated to meet the needs of a changing Presbyterian church. Smith proposes that the institution of the dominant mainline church, and with it the professional function of clergy, is experiencing a "dispossession," a loosening and

[33] Spencer, "Hope and Challenge."

[34] Angie Androit and Deborah Coe, *The Presbyterian Panel Report: Gender and Leadership in the PC(USA)* (Louisville, KY: PC(USA) Research Services, 2016), 4. 21% of female clergy in 2005 includes retired ministers in the denomination. Even with more women being ordained in much of the 21st century, statistics project that the number of female clergy in the PC(USA) will not equal male clergy until 2027. These statistics do not account for those who do not identify neither male nor female, and demonstrates the even larger work the PC(USA) must do to fully adapt to acknowledge its LGBTQ+ clergy.

breaking down of what has been known.[35] He claims this shift is as significant as the change the church experienced post-Revolution into the Age of Association, and with it clergy identity shifting from civil servant to a distinct profession with modernization and institutionalization. With this dispossession "we are witnessing significant long-term declines in the U.S in participation in and identification with religious institutions."[36] The role churches play in people's lives and communities is shifting with it. But he says it is "less of a decline in religious belief and practice, and more of a change in relationship of individuals to institution. [It is movement] from an Age of Association to an Age of Authenticity."[37]

Smith is one among many scholars who have noted the dramatic shifts in American religious landscape, especially expressions of mainline Christianity. Phyllis Tickle calls the shift the "Great Emergence." Offering a metaphor of church's every 500-year rummage sale, she looks at church history throughout its more than two millennia global history, compared to Smith's focus on Christianity in the United States. Tickle writes, "The Great Emergence, like the Great Reformation or the Great Schism or the time of the Great Gregory or the Great Transformation, is a generalized social/political/economic/intellectual cultural shift."[38] David Kinneman of The Barna

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[35] Ted Smith, "No Longer Shall They Teach One Another: The End of Theological Education, Lecture 2: Dispossession" The Sprunt Lectures, Union Theological Seminary, May 4, 2021, //www.youtube.com/watch?v=34yPphOa250.

[36] Smith, "No Longer, Lecture 2: Dispossession."

[37] Smith, "No Longer, Lecture 2: Dispossession."

[38] Phyllis Tickle, *The Great Emergence: How Christianity is Changing and* Why (Grand Rapids, MI: Baker Books, 2008), 120.

Group, in their 2020 State of the Church study, found that Americans who identify as practicing Christians has dropped by half since 2000. He says:

> Americans are softening in their practice of Christianity. These stunning changes raise questions and suggest urgent implications… The rise of digital life, including social media, the economic crisis, changing attitudes about social issues and the emergence of younger generations on the scene are some of the factors that are likely to form undercurrents recalibrating Americans' connection to faith and to Christianity.[39]

The way we shape our beliefs in community and structure our lives together as people is experiencing a tectonic shift. Religious historian Robert Putnam writes:

> Americans have deserted the church pew, the union hall, the Parent-Teacher Association, the Elks lodge, and even the bowling league. By many measures—though not all—the level of civic engagement in the United States has declined since the 1960s. Americans are less connected with one another in voluntary associations (at least in the conventional forms to which their parents were accustomed), as well as in less formal settings.[40]

While Putnam and Kinneman write from a more religious sociological historical perspective, Andrew Root writes about this shift integrating deep theological reflection into his research and observations about the shifting church. These insights are poignantly highlighted in his books *The Pastor in the Secular Age (2019), The Congregation in the Secular Age (2021), Faith Formation in the Secular Age (2017)* and *The End of Youth Ministry (2020).*[41] These scholars are only a small sample of the many

[39] "Signs of Decline & Hope Among Key Metrics of Faith," The Barna Group, March 4, 2020, https://www.barna.com/research/changing-state-of-the-church/.

[40] Gerald Gamm and Robert D. Putnam, "The Growth of Voluntary Associations in America, 1840-1940," *The Journal of Interdisciplinary History* 29, no. 4 (1999): 513. http://www.jstor.org/stable/206973.

[41] Root's books listed here are published by Baker Academic in Grand Rapids, Michigan.

reflections on the shifting of American Religiosity and how it is changing the mainline Protestant church, including PC(USA) congregations.[42]

These changes in church and culture are shaking the foundations of how Presbyterians and other mainline churches have traditionally practiced faith and life together. To enter that conversation more deeply is beyond the scope of this project.[43] However, the impacts of this change in the church are a driving reason the PC(USA) must reevaluate how it shapes its clergy to lead in this rapidly evolving context where the outcome has yet to be fully revealed or realized.

The Presbyterian Church USA, like many historic denominations in the United States, is doing ministry in a liminal time. Liminal comes from a Latin word meaning threshold. We are on the edge of something new, at the threshold of this new emerging future in the Age of Authenticity. Liminality is not new to Presbyterians. It is part of our theology. We worship a God who does generative work in liminal space and time, in the already but not yet. We believe the Holy Spirit dances and thrives in liminal moments. The church's call is to embrace that liminality as we minister in this age as we await the age to come.[44]

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[42] Other resources include Christian Smith, *The Secular Revolution: Power, Interests, and Conflict in the Secularization of American Public Life* (Berkeley: University of California Press, 2003); Mark Chaves, *American Religion: Contemporary Trends,* 2nd Edition (Princeton, NJ: Princeton University Press, 2017).

[43] A helpful brief overview of the variety of scholarship noting the shift in mainline Protestant church and culture is found in Charles R. Foster, *From Generation to Generation: The Adaptive Challenge of Mainline Protestant Education in Forming Faith* (Eugene, OR: Wipf and Stock Publishers, 2012) 3-4, ProQuest eBook Central.

[44] The phrase "already but not yet" was first offered by Gerhardus Vos, sometimes referred to as the father of Reformed Biblical Theology who taught at Princeton Seminary in the late nineteenth and early twentieth centuries.

Yet, the PC(USA) finds itself struggling to move through the change associated with threshold spaces, with liminal moments. Whether or not leaders want to acknowledge it, this change is transforming pastors' responsibility in congregations in a time where the pull of institutional survival tugs against immense possibility for reimagining the Gospel and ministry for a world that aches to experience Good News. With it, the landscape of theological education is shifting. The content imparted through professional education to aspiring pastors in biblical languages and exegesis, ecclesiology and theology, homiletics, and pastoral care from mostly historical euro-centric scholarship is not enough anymore. The task of congregational ministry looks remarkably different than it did in an Age of Association and thriving institutions. David Gortner, director of Episcopal-affiliated Virginia Theological Seminary's Doctor of Ministry Program writes:

> The church as a system and culture is wired to select, train, and deploy for what it values most. This traditional emphasis supports a model of Christian religion that centers attention on the priest or pastor rather than on the community. In this model, the ordained minister becomes a religious functionary, a dispenser of religious goods. Such a model also assumes that interest in church will continue "world without end" in American culture, that people will come because it is their natural inclination to do so — despite evidence over the past four decades of decreasing interest by the American public in participation in church and organized religion.
>
> Thus, pastors and priests who are effective transformational change-agents are not the norm. Indeed, they are swimming against the tide in denominational cultures that communicate mixed messages about what they want from their leaders. (It is only 15-20 years ago that "leadership" was considered among some of our faculty as a concept unbefitting Christian ministry.) Even in the face of a steadily increasing departure from organized religion by the American public, the

> systemic and cultural norm in the Episcopal Church remains one of maintenance.[45]

Such a shift, one that is a defining experience of the church that seems to only happen every few centuries, requires more than tweaks to the process for forming clergy in the vein of leadership scholar Ronald Heifetz' technical change. Technical change takes already existing knowledge, processes, and systems, and uses what is known and has worked in the past to solve problems.[46] Rather, the PC(USA) Preparation for Ministry Process must experience adaptive change, a process of figuring out how to respond to challenges we cannot yet even name. The PC(USA) must embrace the movement and the moment that comes with ministry in-between times and in liminal space. The Preparation for Ministry Process also needs contributing organizations invested in the process of responding to challenging and/or adaptive change as partners and collaborators, rather than isolated silos in tension with each other.

As a denomination, the PC(USA) has noticed the gaps and challenges in the clergy formation process for at least the last twenty years. In 2000, a General Assembly Council workgroup produced a report on "Entrance into Pastoral Ministry" offering a broad evaluation of the effectiveness of the preparation process, and steps to offer changes or further investigation. This report covered four main areas:

- Collaborative guidance for seminaries, presbytery committees, and General Assembly bodies.

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[45] David Gortner, "Clergy Leadership for the 21st Century: Are We Up to the Task," *In Trust Magazine,* 2014, https://intrust.org/Magazine/Issues/Summer-2014/Clergy-leadership-for-the-21st-century.

[46] Ronald A Heifetz, *The Practice of Adaptive Leadership: Tools and Tactics for Changing Your Organization and the World* (Boston: Harvard Business Press, 2009), 19.

- Additional support for first-call pastors once they transition out of the preparation for ministry process.

- Evaluation of a request to consider the advisability of a licensure period after seminary graduation, which the work group ultimately did not recommend.

- Evaluation of the ordination exams.

The 27-page report highlighted where the Preparation for Ministry process works well, and also identified its limitations. It states:

> The issue of relationship between seminaries and presbytery Committees on Preparation for Ministry (CPMs) has been under discussion for a number of years. Concern about this issue has persisted because there is no common understanding of the reciprocal and complementary responsibilities that CPMs and seminaries have in providing support to those with promise for ministry and in seeking worthy and realistic alternatives for those without it.[47]

The separation of the academic from the practical and the distinctly separate seminary from the presbytery, both products of professionalization, were identified as key challenges today.

The report continues to illuminate some of the reasons for the disconnect including presbyteries who feel underequipped to address the multifaceted areas of readiness for ministry. As presbyteries support fewer churches within their bounds, resources—both human and financial—diminish. Presbytery volunteers are increasingly older, and there are fewer people with the time and background in formation to support Committees on Preparation for Ministry.

[47] General Assembly Council of the Presbyterian Church (U.S.A.), Final Report of the Work Group on the Entrance into Pastoral Ministry, Phil Gehman et al., 2000, 9.

On the other side, seminaries are accountable to the state who issues their charter, rules and regulations of the federal government around student privacy, regional accrediting bodies, and the Association of Theological Schools, before denominational partnerships are even brought into the mix.[48] As of this project's writing, there are currently ten PC(USA) affiliated seminaries plus two other theological institutions related to the denomination by covenant agreement. These institutions prepare pastors and other leaders for congregational ministry through advanced degree programs, of which the M.Div. is one of many, and continuing education. They also "serve as centers of theological discourse, reflection and research for the benefit of the wider church during changing times."[49] These seminaries and theological schools are ultimately accountable to their Board of Directors and institutional leaders, and exist as institutions for more than just the preparation of pastors for congregational ministry. The Association of Theological Schools 2019-2020 Graduating Student Questionnaire showed that out of all ATS accredited schools (of which the 9 PC(USA) seminaries are a part) only 45% of graduating students obtained the M.Div. degree, widely considered to be the professional educational standard for those entering congregational ministry.

In addition, just 60% of ATS school graduates planned to serve within a congregational context.[50] So, while each school sends a representative to the Committee

[48] General Assembly Council, "Final Report," 10.

[49] "Presbyterian Theological Seminaries at a Glance," The Presbyterian Mission Agency, accessed December 17, 2021, https://www.presbyterianmission.org/ministries/theology-formation-and-evangelism/theologicaleducation/presbyterian-theological-seminaries-glance/.

[50] Jo Ann Deasy, "2019-2020 ATS Graduates: Insights and Trends from the GSQ" (lecture, The Association of Theological Schools, August 20, 2020).

on Theological Education (COTE), a permanent committee of the General Assembly which helps set the vision for theological education in the denomination, their work is far broader than just the formation of PC(USA) pastors for congregational ministry. Professors in seminaries and theological schools frequently spend their entire career in the academy and lack on-the-ground experience leading congregations. Those professors teach, research, and write based where their passions and expertise meet institutional vision, not necessarily motivated by the most pressing challenges pastors encounter in their congregations. Professors and seminaries that are trying to bridge the gap in pastoral formation find themselves slowed by the lengthy time it takes to modify curriculum and institutional bureaucracy. Seminaries and presbyteries each have their own challenges, which are enough without attempting to bring them into a shared conversation.

Ultimately, the report concluded with several suggested ways to bridge the gap for healthier, more prepared new pastors in the PC(USA). More collaboration between the seminaries and presbyteries was strongly encouraged. It also suggested creating training for Committees on Preparation for Ministry (CPM), and programs to support pastors transitioning out of seminary into first calls.

There seems to be little sustained holistic action that can be traced back to the suggestions of this work group at a General Assembly level. The biggest areas of development were the reworking of the Advisory Handbook on Preparation for Ministry maintained by the Mid Council Ministries Office of the General Assembly, and in the Office of Theology and Evangelism's "Company of New Pastors" cohort, which ran from 2010 to 2015 on funding from the Lilly Endowment. "The Company of New Pastors"

was, "a pastoral formation program that seeks to both deepen and sustain the theological foundation of pastoral leaders… [through] the critical period of vocational formation, beginning in seminary and continuing into the first years of ministry, helping to establish and nurture habits of theological reflection and spiritual formation to sustain a lifetime of ministry." The program concluded when funding ran out and institutional resources and transition no longer could sustain it. Conversation has continued as clergy continue to experience disconnect between how they are prepared for ministry and the actual practice of ministry once out of seminary and the Presbytery's CPM. Yet continued restructuring, staff transition, changing denominational priorities, and declining resources have meant much of the work stays in the research, development, ideas, and hopes phases before it can get launched.

While few programs and collaboration developed from the 2000 Work Group report, there have been adaptations to the Preparation for Ministry Process at the denominational level. In 2007 presbyteries concurred on a General Assembly *Book of Order* Amendment taking those fourteen pages of prescription preparation process and reducing them by half. Then in 2011, a massive overhaul of the whole PC(USA) Form of Government and the *Book of Order* reduced those seven pages of preparation for the Ordination of Minister of Word and Sacrament/Teaching Elder to two pages now found in G-2.0607.[51] The core outcomes of the process remain the same; candidates seeking to be approved for ordination, ready to receive a call, are still required to show remarkably

[51] The new Form of Government in the *Book of Order* that resulted from this reworking in 2011 is known to denominational leaders as NFoG.

similar evidence of readiness for ministry and the same academic credentials as were in G-14. However, as with much of the new form of government's attempt to simplify process and be more fluid, presbyteries now have a more interpretive role in the process. Cargal explains, the vision for the shift was not to change the standards, "but to have more paths to get to the same destination." The goals and outcomes of the preparation for ministry process remained the same, but the way inquirers and candidates pursued ordination could be as varied as God's call to each perspective pastor and as wide as the imagination of a presbytery's CPM.

Yet, CPMs rarely feel empowered to use this creative authority in shaping its formation of clergy on a regional level. Even though academic preparation is only one piece of CPM process, most Committees emphasize the transcript and examination portions of the *Book of Order* requirements.[52] Spiritual development, interpersonal

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[52]From the The Office of the General Assembly of the Presbyterian Church (USA), *The Book of Order 2019-2021: The Consituation of the Presbyterian Church (U.S.A.) Part II,* (Lousiville, KY, The Office of the General Assembly, 2019), G-2.0607.

"A candidate may not enter into negotiation for his or her service as a minister of the Word and Sacrament without approval of the presbytery of care. The presbytery shall record when it has certified a candidate ready for examination by a presbytery for ordination, pending a call. Evidence of readiness to begin ordered ministry as a minister of the Word and Sacrament shall include:

> a. a candidate's wisdom and maturity of faith, leadership skills, compassionate spirit, honest repute, and sound judgment;
> b. a transcript showing graduation, with satisfactory grades, at a regionally accredited college or university;
> c. a transcript from a theological institution accredited by the Association of Theological Schools acceptable to the presbytery, showing a course of study including Hebrew and Greek, exegesis of the Old and New Testaments using Hebrew and Greek, satisfactory grades in all areas of study, and graduation or proximity to graduation; and
> d. examination materials, together with evaluations that declare those materials satisfactory in the areas covered by any standard ordination examination approved by the General Assembly. Such examinations shall be prepared and administered by a body created by the presbyteries."

In 2008 the Presbyteries' Cooperative Committee on Examinations for Candidates completed a General Assembly commissioned 2-year self-study reflecting on the effectiveness of the national examinations in the preparation for ministry process. That report resulted in changes in the ways the examinations were developed and administered aiming to measure application of knowledge in hypothetical ministry

relations, personal growth, and professional development, are softer and less prescribed making them harder to measure growth and development.[53] As of 2017, the Office of Mid Council Ministries in the Office of the General Assembly offers a currently 112-page handbook for CPMs to help support their work, yet these areas beyond academic preparation still end up de-emphasized by CPMs who find themselves challenged to develop and support so much of the process. The CPM, representing the presbytery and its congregations, ends up placing high trust in the institutions conferring degrees on their candidates, with little direct dialogue about curricula, the leadership development of the student, and what is most needed on the ground in today's congregations.

Why Process Simplification Isn't Enough

In an Age of Association and professionalization, placing the authority back into the hands of local presbyteries to adapt the Preparation for Ministry Process to the needs of individual inquirers and candidates makes sense. It is an apt technical solution to an identified problem of a one-size-fits all process that could not be stretched to meet the needs of the body it was serving.. Since 2007 the demographics of candidates and inquirers in the PC(USA) continues to diversify. As of 2020, 56% of inquirers and candidates in the PC(USA) are women. The PC(USA) has "ordained more women than

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situations. The report also acknowledged the limitations of examinations in completely assessing readiness and encouraged Presbytery CPMs to reimagine presbyteries can be responsive to the unique ministry formation needs of each candidate. See Presbyteries' Cooperative Committee on Examinations for Candidates, Report of the Presbyteries' Cooperative Committee on Examinations for Candidates to the 218th General Assembly, 2008, https://www.presbyterianmission.org/resource/self-study-report-pccec/.

[53]Mid Council Ministries of the Office of the General Assembly, "Advisory Handbook on Preparation for Ministry in the Presbyterian Church USA 2.1," 2017, https://www.pcusa.org/resource/preparation-ministry-handbook/.

men to ministry since 2010… and more than a quarter of those training for ministry now are not white."[54] At the same time, of those inquirers and candidates, 35% are age 40 or older. With this comes more inquirers and candidates taking courses part-time and online, and finding other ways of meeting the requirements that fit a diverse set of needs. The process is becoming more accessible to those who do not fit the mold of mainline pastor from the 1980s and before it. Expanding access to the ordination process and ways to complete it is certainly important for a church that is more diverse than ever. But that alone does not address the challenge of a pedagogy that looks back to a past that is not the church's present or future. Simplification of a top-down process is the solution only if the partners in the process—presbyteries and seminaries--are adapting to the changes that come with a culture shift from an Age of Association to the Age of Authenticity themselves. It is time the PC(USA) looks to emphasize more than the traditional disciplines for the office of professional ministry. The PC(USA) must teach skills and a mindset for leading churches from institutionalization to the new future, for leading church in liminal transition. They must incorporate leadership development of its new pastors, emphasizing resilience, adaptability, and so much more.

Hope for the Future

With a history of the Presbyterian church marked at pivotal moments by tension and division over the forms and ethos of clergy education and credentialing, it is unsurprising that the church today finds itself with a multifaceted process shaped by

[54] Ken Broman-Fulks and Tim Cargal, "Episode 15: What's Happening in Seminaries,", in *Pastors4Pastors*, produced by Ken Broman-Fulks, podcast audio, January 17, 2021, https://www.youtube.com/watch?v=oVoqqkrvPFI.

different histories and goals. Splits and reunification, various pedagogies, and the different ways God speaks to communities in their time and place, all play a factor in how the process developed into what it is today. In many ways the questions remain the same as they were since the beginning of American Presbyterian history—should pastoral formation be intellectual or practical? Should it be accountable to local churches, educational institutions, or ecclesial councils? Who teaches and what do they teach? What standards exist for pastors as professionals? Are professionals even still the formative goal? In tangible ways Presbyterian ministerial preparation demonstrates that "knowledge is power." Who has been welcomed and kept out of Presbyterian church leadership based on these ordination and education standards reveal much about the Presbyterian past—a past with moments to celebrate, and also moments to lament. Ultimately, the church must wrestle with whether the current ordination and educational standards prepare pastors for the realties they will encounter as they minister in an Age of Authenticity. These are some of the many tensions and questions the church is still grappling with today.

Yet, there is also remarkable hope that a shared purpose and a commitment to forming pastors well for ministry is possible. The 21st century brings yet another shift in the church and clergy's role in the United States. If the hypothesis of Smith and the team at the Theological Education between the Times project is correct, this shift from professionalization to individualization and authenticity is as significant as the move

from the standing order to professionalization after the Revolution.[55] Today we live in the liminal space of this shift, which undoubtably has an impact on how clergy are prepared for ministry in this new era and what is needed for their thriving. Daniel Alshire, former president of the Association of Theological Schools writes:

> In the past decades, *how* the schools taught was changing, and for Protestant schools, *where* they taught was changing as well as *when* students could study. But, for the most part, *what* the schools have been teaching has remained quite stable. It was a curriculum that emerged in the nineteenth century and matured in the twentieth century into the model of professional theological education that exists today. This curriculum and educational model developed during an era of strong religious institutions and robust denominational structures. What should be the pattern of theological education when these realities are no longer present?[56]

This is the question presbyteries, seminaries, and the PC(USA) as a denomination need to be asking as they experience these changes occurring and witness how they are impacting pastors.

The Clergy into Action Study cites a 2013 PC(USA) research study of pastors ordained between 2000 and 2002, and where they were five years after ordination. "Approximately 22.5% fell into the categories of 'had no valid call' or 'were no longer' ordained ministers in the PC (USA)."[57] While the reasons for inactivity in ministry were

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[55] Ted Smith, "No Longer Shall They Teach One Another: The End of Theological Education, Lecture 3: Renunciations," The Sprunt Lectures, Union Theological Seminary, May 4, 2021, https://www.youtube.com/watch?v=IBQ_kVfUKE4.

[56] Daniel Alshire, "The Task for a New Day," Faith & Leadership, March 23, 2021, accessed August 15, 2021, https://faithandleadership.com/task-new-day.

[57] David Gortner, "How Many Quit? Estimating the Clergy Attrition Rate," Into Action - From Seminary into Ministry, accessed August 3, 2020, http://into-action.net/research/many-quit-estimating-clergy-attrition-rate/.

varied, dissatisfaction was a high motivator in individuals' responses. If as many as 1 in 5 newly ordained clergy are not serving in ministry after only five years of ordination almost ten years ago, the church must seriously consider what is happening (or not happening) for these new pastors to fail to thrive among us. Before the pandemic, PC(USA) pastors were challenged to lead with multiple roles as ministers, pastoral care (and sometimes first response mental health) providers, leaders of non-profit organizations, and heads-of-staff. When the majority of members in the pews are of an age spiritually and institutionally formed in the Age of Association, there is still a high commitment to maintaining the infrastructure of institution as it once was. Now pastors also have the increasing expectations to simultaneously minister within the Age of Authenticity, being community organizers, conflict resolution specialists, visionaries, and hope-bearers to a church that is shaping a new future in a world torn apart by division, misinformation, and an uncertain future. These expectations and the challenges associated with them are coming even more clearly into the spotlight as clergy struggle during the current Covid-19 pandemic.

In light of these mounting expectations, many pastors feel under-resourced and ill-prepared for the challenges that face them in the congregations they serve. Measuring knowledge alone to set a national standard for clergy readiness does not indicate whether a new pastor will thrive or lead a congregational well in this new day. This project is not intended to argue the importance of emphasizing knowledge based professional preparation and the skills the current process tries to impart—each has a purpose and value for pastors and the denomination, and the church would suffer without them in

some way. We absolutely want pastors who can exegete scripture and preach it, taking the faith narratives of our past and making them relevant to today's communities seeking God's movement now. We need to know our theology and church history to understand from where we have come. Standards help a diverse national church set expectations when they hire new clergy. However, this framework assumes the knowledge currently taught supports a standard of shared experience and current needs in congregations that may not be reality. Clergy now need to function with multiple hats as leaders in what have become complex church systems, many of which now have dwindling resources from which to draw—financial, human, and imaginative—and operate without a shared Presbyterian experience and unified vision. More than only knowledge, pastors need equipping for resilient leadership as they face adaptive challenges in the church and denomination daily.

The Preparation for Ministry process in its current form and presbytery implementation only offers a portion of what pastors need to be set up to thrive as they serve God in the Age of Authenticity. The PC(USA) can make changes to simplify the process, they can point presbyteries and seminaries back to the theology that undergirds the preparation for ministry process, its best practices, and the partnerships that make for pastoral thriving, but little will change for pastors preparing for ministry by punting the problem to seminaries and presbyteries who are themselves challenged by deinstitutionalization, diminishing resources, and a massive need to revision ministry in this new landscape.

Something new is on the horizon. The prophet Isaiah pointed to God making a way in the wilderness and rivers in the desert: "I am about to do a new thing; now it springs forth, do you not perceive it."[58] For the preparation for ministry process, this will require presbyteries, seminaries, and the PC(USA) to engage in introspective work and adaptive change. It will also require these entities to have shared conversation about what they each can offer to shape clergy well for this new day. Thankfully, there are already accomplished, faithful leaders in each of these organizations engaged in this work.[59] Yet, it will take time for any changes proposed and realized at institutional levels to trickle down into the Preparation for Ministry Process. God's "new thing" is springing forth, it is just taking time to perceive it.

The questions that drive this project, then, are what can be done now to help pastors thrive and faithfully serve God through congregational ministry in this liminal time, while those deeper conversations are taking place? Is there something that Presbyteries can offer to bridge the gaps in the PC(USA) preparation for ministry dance without waiting for the other entities to do something about it? Will the PC(USA) follow the Holy Spirit's lead as she dances into the Age of Authenticity?

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[58] Isa. 43:19, NRSV.

[59] Significant work on the new future of theological education is already underway by many organizations. For more information see: "Theological Education Between the Times," Candler School of Theology, 2020, https://tebt.candler.emory.edu/; The Association of Theological School's new Standards of Accreditation adopted in June 2020, "Standards of Accreditation, Association of Theological Schools, accessed February 15, 2022, https://www.ats.edu/Standards-Of-Accreditation; "Pathways for Tomorrow Initiative," Lilly Endowment, Inc., accessed September 5, 2021, https://lillyendowment.org/pathways-for-tomorrow-initiative/;For information on changes in overall structure and mission of the PC(USA), see the General Assembly Way Forward and 2020 Vision Reports and the Presbyterian Mission Agency Coordinating Committee consultant report: Presbyterian Mission Agency Board, CounterStories Consulting Report & Appendices, October 6-7, 2021, https://www.presbyterianmission.org/wp-content/uploads/P.201-CounterStories-Consulting-Report-and-Appendices.pdf.

In the next chapters I will explore where the gaps may be in this current educational paradigm, and offer a possible solution for this liminal time. I believe one answer to this question is to develop presbytery-based peer learning cohorts. In the next chapter, I will dive into adaptive leadership and vertical leadership development. Vertical leadership development offers an additional way to equip leaders that does not rely on knowledge and known technical solutions. It is not something that is necessarily taught in a classroom, but rather intentionally cultivates leadership capacities. Vertical development shapes the psychological consciousness of the leader and expands their ability to holding complexity not just in their work, but in the world. I believe pastors who are shaped intentionally through vertical leadership development are better equipped to lead PC(USA) congregations through this current season of dramatic change and challenges. Incorporating vertical leadership development into the Preparation for Ministry Process is a way the PC(USA) can set up emerging and new clergy to thrive in ministry from the very beginning of their vocational journey.

Chapter 2

Intentional Transitions: Vertical Leadership Development as a New Step in Pastoral Formation

In the first chapter, I spend time "on the balcony… above the dance floor" to get a sense of what is really happening in clergy formation today.[60] I offer that the PC(USA) Preparation for Ministry Process in its current form does not fully prepare clergy for the challenges of leading congregations in the 21st century. The process is a complex dance with multiple entities coordinating its steps, struggling to sync with its partners in a time of rapid cultural change. The gaps in the process leave many pastors struggling to thrive when they enter congregational ministry.

As American culture shifts from an Age of Association to an Age of Authenticity, the church is changing with it. The denomination's Preparation for Ministry process was built up from a history that tried to balance equipping clergy while maintaining standards of orthodoxy, orthopraxy, and professionalism.[61] The Preparation for Ministry model assumes pastors are studying to serve congregations shaped in an ethos of institutionalization in the era of associations. It was not created to prepare pastors to lead their churches through adaptive change for a new cultural reality and the changing position of the church within it. While recent changes to the Preparation for Ministry Process permit presbytery CPMs to creatively foster and assess a candidate's wisdom,

[60] Heifetz, Linsky, and Grashow, *The Practice of Adaptive Leadership*, 7.

[61] See Chapter 1 and Smith, "No Longer, Lecture 1: Consolidation."

maturity and leadership skills, underequipped CPMs rarely have the resources to devote to such work. The CPM, representing the presbytery and its congregations, ends up placing high trust in the institutions conferring degrees on their candidates, with little direct dialogue about curricula, the student's leadership development, and what is most needed on the ground in today's congregations. Imparting a theological framework and knowledge while assessing readiness with standardized examinations offers incomplete formation for pastors called to lead their congregations through the biggest cultural pivot the church has seen in centuries, where even the cultural definition of what it means to be community and how meaning is made is shifting.

If the process is incomplete, what can help bridge the gaps to better prepare pastors to serve in this liminal space? This challenge is more than making the existing transitions in the Preparation for Ministry dance smoother; it is about updating the dance with new steps so that pastors can thrive and lead their congregations well on the new contours of the ministry dance floor. In this chapter, I propose the Preparation for Ministry Process needs to emphasize vertical leadership development as a core component of clergy formation. I explore research in vertical leadership development rooted in adult human development and intersecting with organizational psychology. I then explore the current transition into ministry research, highlighting vertical development's absence from the explicit curricula. By strengthening clergy's holistic capacity for leadership in adaptive times, the PC(USA) can increase pastors potential for thriving in ministry and strengthening congregations in this new age.

The science and art of leadership development emerged as a part of conversations among organizational strategists looking to advance the effectiveness of an organization's leaders. A multidisciplinary approach became a focus for both business leaders and the academy in the late 1990s and early 2000s, continuing today. Recently, the PC(USA) began to engage in the dialogue, utilizing both the literature from established experts in the field like Ronald Heifetz and other social scientists, as well as generating literature from within the church community such as Tod Bolsinger's *Canoeing the Mountains: Christian Leadership in Unchartered Territory.*[62] Here I will review some of the relevant leadership research as it pertains to clergy formation in the PC(USA).[63]

Adaptive Leadership

Adaptive leadership is "the practice of mobilizing people to tackle tough challenges and to thrive."[64] Adaptive challenges, as mentioned in the previous chapter, are those challenges where the answer exists somewhere beyond current knowledge. The information, tools, and processes that have worked in the past will not solve an adaptive challenge. Adaptive leadership equips people and organizations to respond to these unique challenges.

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[62] Tod Bolsinger, *Canoeing the Mountains: Christian Leadership in Unchartered Territory* (Downers Grove, IL: Intervarsity Press, 2015). Bolsinger is a PC(USA) pastor who is now on the faculty at Fuller Seminary as an assistant professor of practical theology, the Vice President of Vocation and Formation, and Vice President of Leadership Formation.

[63] So much work has been written in this field it would be impossible to capture all of the scholars and practitioners who have contributed to leadership as an academic discipline in the last forty years. For the purposes of this project, I focus on particular conversations about adaptive leadership as defined by Heifetz and the work of his colleagues and contemporaries.

[64] Heifetz, Linsky, and Grashow, *The Practice of Adaptive Leadership,* 19.

Distinct from adaptive challenges, technical challenges are defined as problems where the solution lies in information we already know. These challenges may be difficult ones that require precise skills and expertise to solve, but the way to the desired outcome is known, exists, and presumably has succeeded elsewhere before. Heifetz, Linsky, and Grashow note that "problems do not always come neatly packaged as either "technical" or "adaptive"… Most problems come mixed, with the technical and adaptive elements intertwined." They further state that "systems, organizations, families and communities resist dealing with adaptive challenges because doing so requires changes that partly involve an experience of loss."[65] Losing what is familiar is difficult, even when one can see that the familiar is not solving the current challenge. Often, the imperfection of the current experience is more comfortable than the unknown future.

PC(USA) churches may particularly struggle with the losses associated with adaptive change because the memory of losses permeate so many congregational narratives. PC(USA) churches are generally getting smaller, and there are fewer of them than when the denomination was formed forty years ago. In 2020, the PC(USA) claimed 1.24 million members and just 8,925 congregations, a loss of over 750,000 people and 1,635 congregations in just ten years. Comparatively, PC(USA) membership sat at over 2.5 million in 1990. In 2020, 90% of congregations were 300 members or less, with 64% of those churches claiming 100 members or less. The PC(USA) is also getting older, with its largest demographic being individuals ages 71 and over.[66] Impacts of the PC(USA)'s

[65] Heifetz, Linsky, and Grashow, *The Practice of Adaptive Leadership,* 19-22.

[66] Office of the General Assembly, *Comparative Study of Statistics 2020* (Lousiville, KY: Presbyerian Church U.S.A, 2020) https://www.pcusa.org/site_media/media/uploads/oga/pdf/2020_comparative

shrinking are felt in widespread ways. Congregants long for the days when pews were filled, staffs and budgets bigger, and youth ministries were robust, with young people making noise in the church basements.

New PC(USA) pastors, like many organizational leaders, often find themselves in congregations looking for technical fixes to adaptive problems. Phrases like, "if we just did what *insert name of long-tenured pastor in the 1990s* did" or "we need to hire the new, young seminary grad with a wife and kids to bring other young families back," illustrate such assumptions that the elusive technical fix is just finding the right person to do the thing that worked before. I recently received an email from a colleague, whose name is omitted for anonymity, who was supporting a congregation's search committee for a new associate pastor in a 1,300 member flagship congregation. He wrote seeking recommendation for a pastor who is "enthusiastic/ charismatic/ energetic, fosters fun, with a winsome personality that makes people want to be around them…it would also be nice if the candidates have a spouse and children." When the newly graduated seminarian who fits this description is hired and the worship attendance and budget still struggle two years later, tension can emerge between the congregation and the pastor when the assumed technical fix (a pastor who can bring in young families) could not solve the adaptive challenge (drastic shifts in American mainline Protestant faith expression).

Many congregations say that they know they need to change, but they struggle to do the work of change itself. They look to hire pastors that excel in the tried-and-true

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_stats.pdf., and Office of the General Assembly, *Comparative Study of Statistics 2010* (Lousiville, KY: Presbyerian Church (U.S.A), 2010) https://www.pcusa.org/site_media/media/uploads/oga/pdf/2010-comparative-summaries-stats.pdf.

marks of a Presbyterian pastor—preaching, teaching, and pastoral care—who they believe will arrive with a magic wand to create change without actually changing anything that is familiar and comfortable. And who can blame these churches? In a world recently punctuated with so much upheaval, uncertainty, and fear people look to their congregational home to provide the comfort, peace, and stability that it has given in the past. There is a disconnect between the stated outcomes congregations want from their pastoral leader and the qualities they search for in their pastor. As of this writing, there were 566 ministry positions available in the PC(USA)'s Church Leadership Connection, but only one fifth of the communities seeking a new leader list "change agent" as a preferred top-ten leadership competency.[67]

Heifetz, Linsky, and Grashow write:

> However you ask the questions about adaptive change and the losses they involve, answering them is difficult because the answers require tough choices, trade-offs, and the uncertainty of ongoing, experimental trial and error. This is hard work not only because it is intellectually difficult, but also because it challenges individuals' and organizations' investments in relationships, competence, and identity. It requires a modification of the stories they have been telling themselves and the rest of the world about what they believe, stand for, and represent.[68]

Challenging identity is extraordinarily difficult work, especially in congregations where a core component of ministry includes a primary function of shaping the very identity of its

[67] The Church Leadership Connection (CLC) is the "match.com" of the Presbyterian Church linking congregations searching for pastors to churches looking for calls (not every call listed in the CLC requires ordination, but the vast majority do). One part of the matching process is to connect congregations and pastors that match on a list of leadership competencies. Congregational nominating committees can choose ten of up to thirty-three leadership competencies to prioritize in their next pastor. On November 5, 2021 only 1/5th (117) of open positions prioritized change-agent in their next ministry leader.

[68] Heifetz, Linsky, and Grashow, *The Practice of Adaptive Leadership,* 23.

members around the Christian story. Tilling the ground for change to take hold sometimes means unlinking that identity from a single expression or experience of church known to many worshippers in the pews. It involves imagining how our identity as God's beloved, claimed in our baptism, can transform over time, as well as transform communal life that emerges from such identity. That work takes a different type of leadership than technical capacities and many of the historic theological disciplines taught in the current iteration of Preparation for Ministry.

Presbyterian systems are led by Elders, a spiritual governing body elected from within the congregation to make decisions for and on behalf of the congregation. Elders bring incredible diversity of gifts and experiences to their roles as leaders and vision casters within congregations. Yet, the vast majority of individuals elected by a congregation to serve as Elders have either no theological training or have been shaped by popular religious leaders more accessible through media, books, and pop Christian music that have very little synchronicity with PC(USA) theology. Many have an experience of church and worship limited to the former iteration of church in an age of institutional trust and thriving. Pastors, as moderators of Sessions, with one vote among the Elders rather than being the authoritative decision maker, must navigate leading communities of Elders with vastly different experiences and expectations of their role on Session (the board of Elders).

Additionally, from the moment newly ordained pastors walk into the door of a church, they immediately must navigate multiple professional roles that find themselves often in tension, and sometimes contradiction. They are charged with meeting the

expectations for spiritual and emotional support of the employing congregation, and shepherding the congregation's vision through this process of adaptive change, all while within the formalized institutional framework. The PC(USA) must find ways to support and equip new pastors (and experienced ones, though that is not focus of this project) as they navigate their work in all its complexities. It means clergy formation, somewhere along the way, needs to teach not only the skills but also nurture the psychological development necessary to facilitate adaptive change while also holding the other expectations of a pastor.

Horizontal and Vertical Leadership Development

The current PC(USA) Preparation for Ministry process excels at transmitting a body of knowledge to prospective pastors through traditional academic means. It has ways of measuring readiness of retention and application of that knowledge. It also tries to include opportunities to integrate that learning with practice and shape the growing vocational identity of minsters through experiences like field education, internships, and Clinical Pastoral Education (CPE).[69] These opportunities are critically important for pastoral formation. This project is not a critique of what seminaries and theological schools offer. Students may even learn concepts like adaptive leadership in seminary

[69] Clinical Pastoral Education (CPE) is often an additional requirement of Presbytery CPMs as they live into their role of assessing the development, maturity, and leadership of their ministry candidates under care. From the Association of Clinical Pastoral Education (ACPE), CPE "is interfaith professional education for ministry. It brings theological students and ministers of all faiths…into supervised encounter with persons in crisis. Out of an intense involvement with persons in need, and the feedback from peers and teachers, students develop new awareness of themselves as persons and of the needs of those to whom they minister." "Frequently Asked Questions," Prospective Students, Association of Clinical Pastoral Education, accessed November 20, 2021, https://acpe.edu/education/cpe-students.

courses. However, knowledge is only one iteration of learning and formation. I believe the Preparation for Ministry process does not go far enough in developing leadership capacities and integrating them into a leader's identity to make a difference in times of adaptive challenge.

Our post-modern, Age of Authenticity world requires even more skills and leadership capacities than before. Business leaders describe the current landscape as a "VUCA world."[70] VUCA stands for volatility, uncertainty, complexity, and ambiguity. The church, while focused on soul tending in the name of Jesus Christ instead of business outcomes, shares the same situational landscape. Nicholas Petrie with the Center for Creative Leadership explains:

> For [an] organization to truly excel in a messy VUCA world, you will need to develop leaders who combine the wise mind needed to choose the right strategies (vertical development) with the skills and experience to execute them (horizontal development). The looming challenge for most organizations is that their leadership development efforts are focused exclusively on horizontal development. Rather than not enough vertical development, the problem for most is that there is none.[71]

Vertical development expands the ability of a leader to think, hold complex ideas, and balance competing values. Horizontal development transmits skills and knowledge. Both are necessary for leaders to do their work. People need to know the what, how, and why of the things they do in their vocation. Pastors need to know how to preach and exegete

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[70] Nathan Bennett and G. James Lemoine, "What VUCA Really Means for You," *Harvard Business Review*, January 2014, https://hbr.org/2014/01/what-vuca-really-means-for-you.

[71] Petrie, "Vertical Leadership Development, Part 1," 12,

scripture. They need instruction in how to administer the sacraments while that action must also be steeped in the theology of sacraments. Ethically, pastors must know the nuances of providing end-of-life spiritual care, and they should know the skills and polity to moderate a meeting if that will be a function of their job. This is all horizontal development, and pastors are expected to have quite a lot of horizontal development before ordination. The current PC(USA) Preparation for Ministry Process is built for this pouring of horizontal knowledge and experience into candidates for ministry and then measuring how much their vessel holds as a measure for readiness for ordination.

The challenge with horizontal development, particularly in today's church, is that a ministry candidate will never be able to gather all the knowledge from experts they need before beginning ordained ministry. Even if there is a commitment to life-long learning and continuing education after seminary, the breadth of knowledge expected of pastors today is enormous. As churches face dwindling budgets and reductions in staff, pastors end up taking on responsibilities previously handled by trained Christian educators, administrators, and other support personnel. As previously engaged and invested lay leaders age out of primary roles or step back due to other life circumstances, new leaders sometimes step in with little familiarity with the church or the role they have been asked to fill. In these situations, pastors find themselves expected to be teaching committee essentials like budget preparation, stewardship, and personnel basics, in addition to the support and education they offered for ecclesial leadership in the past. In the Covid-19 pandemic, clergy had to pivot and learn skills for live streaming worship services or recording worship, turning their living rooms into makeshift recording and

editing studios. The list of skills needed for pastors today is seemingly endless—visit any clergy social media network site to see the latest skill they are trying to learn and the frequency with which those skills change. These new, additional skills are added to the skills they needed for the Presbyterian Church in the Age of Association. They are now expected to pastor with a foot in each era. This is where horizontal development has its limits. At some point, only so much time can be set aside to keep pouring into and filling the vessel. James Wind and David Wood from the former Alban Institute write:

> In a variety of ways, the seminaries of America lead their students through an ever expanding maze of knowledge that some have called a theological encyclopedia. Over the centuries, and especially in the era following the Enlightenment and the invention of the modern university, this theological encyclopedia has become so large, so complex, so specialized and technical, and so multidimensional—covering more than a dozen fields from traditional disciplines of bible, history, and theology to modern disciplines of psychology, education, and the social sciences—that the old goal of mastery now seems naïve or quaint.[72]

There is also a limit to how much you can pour in before the vessel overflows, and the knowledge spills out and over, unable to be actualized.

The leadership challenge that arises from the limits of horizontal development is, how do you develop a more malleable, effective vessel? Vertical development looks to expand the contours of the vessel, or as to grow the cup and expand the mind of the leader. Petrie continues, "Vertical Development refers to advancement in a person's thinking capability. The outcome of vertical stage development is the ability to think in

[72] James P. Wind and David A Wood, *Becoming a Pastor: Reflections on the Transition into Ministry*, (Herndon, VA: Alban Institute, 2008), 12, https://alban.org/uploadedFiles/Alban/Bookstore/pdf/TiMReport.pdf.

more complex, systemic, strategic, and interdependent ways."[73] Jones, Chelsea, and Egan offer this definition: "vertical leadership development provides a philosophy that moves from focusing on *what* leaders know toward understanding *how* leaders make sense of knowledge acquired."[74] Vertical development increases a leader's capacity to think through and to handle the adaptive challenges that need to be solved with answers we do not yet have. Vertical development opens the creativity of leaders, eases their access to resources both in and beyond themselves, increases their resiliency, and expands their perspectives.

Psychologist Susanne Cook-Greuter, one of the pioneering scholars of vertical leadership theory writes:

> When we talk about development in the context of human development, we distinguish between lateral [horizontal] and vertical development. Both are important, but they occur at different rates. Lateral growth and expansion happens through many channels, such as schooling, training, self-directed and life-long learning as well as simply through exposure to life. Vertical development in adults is much rarer. It refers to how we learn to see the world through new eyes, how we change our interpretations of experience and how we transform our views of reality. It describes increases in what we are aware of, or what we can pay attention to, and therefore what we can influence and integrate. In general, transformations of human consciousness or changes in our view of reality are more powerful than any amount of horizontal growth and learning.
>
> Most learning, training and development is geared towards expanding, deepening, and enriching a person's current way of meaning-making. It's like filling a container to its maximal capacity. We develop people by teaching them new skills, behaviors and knowledge and to apply their new competencies to widening circles of influence. Vertical development, on the other hand, refers to supporting

[73] Petrie, "Vertical Leadership Part 1," 8.

[74] Hannah E. Jones, Julie A. Chesley, and Terri Egan, "Helping Leaders Grow Up: Vertical Leadership Development in Practice," *The Journal of Values-Based Leadership* 13, no. 1, article 8 (Winter/Spring 2020): 1, https://scholar.valpo.edu/jvbl/vol13/iss1/8/.

> people to transform their current way of making sense towards broader perspectives.[75]

Integrating intentional opportunities for vertical development as part of the preparation for ministry process invests in the pastor as a person and a leader with a long view. When CPMs equip pastors to make sense of the world through broader perspectives than those with which they enter the ministry discernment process, we unlock possibilities for integrating their learning with their leadership in ways that reach far beyond themselves, with whatever adaptive challenge comes their way.

Vertical Development Meets Adult Learning

Vertical development is an overarching title for several theories of adult developmental perspectives as applied to organizational leadership. This field is rooted in the work of Jane Loevinger, Lawrence Kohlberg, and Clare Graves who built off the initial human development work of Jean Piaget and Abraham Maslow.[76] Each theory represents ways adults make meaning and process their world as they move through stages of development after adolescence. Jones, Chelsea, and Egan write, "Vertical development refers to an individual's progressive growth through stages of increasing socio-emotional and cognitive sophistication, shaping how they interpret and interact with their environment."[77]

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[75] Susanne Cook-Greuter, "Making the Case for a Developmental Perspective," *Industrial and Commercial Training* 36, no. 7 (December 2004): 276-277, https://doi.org/10.1108/00197850410563902.

[76] Cook-Gretuter, "Making the Case," 276.

[77] Jones, Chelsea, and Egan, "Helping Leaders Grow Up," 2.

Across theories, more advanced development correlates to higher effectiveness in leadership of complex situations. They claim these stages can be measured and can be intentionally cultivated. Susanne Cook-Greuter continues:

> Development in its deepest meaning refers to transformations of consciousness. Because acquisition of knowledge is part of horizontal growth, learning about developmental theories is not sufficient to help people to transform. Only specific long-term practices, self-reflection, action inquiry, and dialogue as well as living in the company of others further along on the developmental path has been shown to be effective.[78]

William Torbert, considered a pioneer in applying adult development to organizational leadership, was an early adopter of developmental theory in the 1980s and spent several decades honing what is now known as the Leadership Development Framework (LDF). The LDF includes seven or eight stages of adult leadership development.[79,] Tolbert's developmental theory claims "beginning in childhood, we can develop through eight action-logics over a lifetime (though few today adventure beyond the first four); and that organizations and scientific methodologies can also develop to more complex and more present-centered action-logics."[80] Those action-logics, or stages

[78] Cook-Gretuter, "Making the Case," 276.

[79] Nicholas Petrie, "The What and the Why of Vertical Development," Resources, Nick Petrie Future Trends in Leadership Development, 2018, 1, https://www.nicholaspetrie.com/_files/ugd/a8b141_9616bf0929b842b2b796b934361248bd.pdf. Torbert added the eighth stage later in his career, so much of the literature only lists seven stages. There is also slight variation across articles on the titles for the action logic stages correlating to when the article was published.

[80] William R. Torbert, "The Pragmatic Impact on Leaders and Organizations of Interventions Based in the Collaborative Developmental Action Inquiry Approach," *Integral Leadership Review*, August-November 2017, http://integralleadershipreview.com/15836-collaborative-developmental-action-inquiry/.

of development are in order of development from basic to most complex; opportunist, diplomat, expert, achiever, individualist, strategist, and alchemist.

A brief overview of these developmental stages are as follows:[81]

The Opportunist (preconventional) focuses on personal wins and sees the world and other people as opportunities to exploit. Others are competitors, and Opportunists crave situations they can control. Bad behavior is justified by the need to win at all costs. In over 25 years of studies with business professionals, only 5% of leaders met the developmental characteristics of this lowest category. "Few opportunists remain managers for long, unless they transform to more effective action logistics. Their constant firefighting, their style of self-aggrandizement, and their frequent rule breaking is the antithesis of the kind of leader people want to work with for the long term."[82]

The Diplomat (conventional) tries to please those in authority at all costs with the goal of avoiding conflict. They are driven by the value of conforming to be accepted and exert their own influence through cooperation. Leaders operating from the action-logic of Diplomat struggle with change, as "initiating change, with its inevitable conflicts, represents a grave threat to the Diplomat, and he will avoid it if at all possible, even to the point of self-destruction."[83]

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[81] The descriptions and associated research on Seven Action Logics is taken from David Rooke and William R. Torbert, "Seven Transformations of Leadership," *The Harvard Business Review Magazine,* April 2005, https://hbr.org/2005/04/seven-transformations-of-leadership.

[82] Rooke and Torbert, "Seven Transformations."

[83] Rooke and Torbert, "Seven Transformations."

The Expert leads by perfecting knowledge in both professional and personal life. Experts account for the most action-logic leaders in a particular category at 38%. They use data and logic to gain consensus. Such strategy only works with others who are seeking data driven decisions, and when problems are technical challenges that can be measured with the instruments and processes already available.

The Achiever is focused on outcomes for both individuals and teams. They create strong teams, though often struggle to think in new ways and can be in competition with Experts.

The Individualist addresses gaps between strategy and performance. They see themselves in relationship to the system, "or between the organization's values and its implementation of those values. This conflict becomes the source of tension, creativity, and a growing desire for further development."[84] They work well with others who do not operate from an Individualist mindset.

The Strategist is about transformation of the self and organization. They are adept at communication and collaboration as they seek transformation. "According to the Strategist's action logic, organizational and social change is an iterative development process that requires awareness and close leadership attention…The strategist works to create ethical principles and practices beyond the interests of herself and her organization."[85]

[84] Rooke and Torbert, "Seven Transformations."

[85] Rooke and Torbert, "Seven Transformations."

The Alchemist creates social transformation. Alchemists have the unique ability to adapt and "reinvest themselves and their organizations in historically significant ways."[86] They can deal with complexity in many areas all at once, and are motivated by moral standards for the good of others. Tolbert's research suggests only 1% of the leaders reach this category.

Tolbert's stages fit into four main tiers of human consciousness; preconventional (opportunist), conventional (diplomat, expert, achiever) postconventional (individualist, strategist, alchemist) and transpersonal (and the eighth stage later added by Torbert). Cook-Greuter writes:

> Most people in modern society function at the conventional stages (75-80 percent). Only about 10-20 percent of adults demonstrate postconventional action logics. Transpersonal ways of meaning-making are even rarer…As the speed and reach of global change and challenge increase, it becomes more urgent for society that more people develop postconventional capacities.[87]

Postconventional capacities are needed to lead in a VUCA world.

Torbert and Cook-Greuter are not the only scholars emphasizing the importance of human development as part of leadership formation. Robert Kegan and Lisa Lahey apply principles of vertical development in their research and work with organizational change as well.[88] Their research works with a three-tiered model of adult mental

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[86] Rooke and Torbert, "Seven Transformations."

[87] Cook-Greuter, "Making the Case for a Developmental Perspective," 278.

[88] See Kegan and Lahey¸ *Immunity to Change: How to Overcome it and Unlock Potential in Yourself and Your Organization* (Boston: Harvard Business Press, 2009), and *An Everyone Culture: Becoming a Deliberately Developmental Organization* (Boston: Harvard Business Press, 2016). Kegan authored his

complexity (building on two earlier stages in childhood and adolescence), as compared to the four tiers used by Tolbert. Kegan and Lahey name these three adult tiers "the socialized mind," "the self-authorizing mind," and "the self-transforming mind." They highlight the necessity of leaders having a "self-transforming mind" to not just survive but thrive through adaptive challenges. Those few rare individuals with self-transforming minds are able to hold contradictions and differing values. They are dialectical and the "meta-leaders."[89] Kegan and Lahey's research suggests that while the problems facing organizations in the 21st century require leaders with self-authorizing and self-transforming minds, most people have not reached these levels of development—58% of those they researched had not even reached the self-authorizing stage. Kegan and Lahey write, "these data suggest that the gap between what we now expect of people's minds (including our own minds) and what our minds are actually like is quite large. We expect most leaders to be more complex than self-authorizing, and very few are."[90] They argue that "the field of 'leadership development' has overattended to *leadership* and underattended to *development.*"[91] Those who lead leaders must attend to the human development aspect of this work if efforts to develop leaders are to make lasting change:

> An endless stream of books declares one or another characteristic crucial to leadership success, and then sets out to help you master it. The various attributes

own five stages of adult development, "Orders of Consciousness. Together they are best known for their work on change immunity and deliberately developmental organizations.

[89] Robert Kegan and Lisa Lahey, "Adult Development and Organizational Leadership," in *Handbook of Leadership Theory and Practice: A Harvard Business School Centennial Colloquium*, ed. Nitin Nohria and Rakesh Khurana (Boston: Harvard Business Review Press, 2010), 774.

[90] Kegan and Lahey, "Adult Development," 785.

[91] Kegan and Lahey, "Adult Development," 787.

> called for in a leader make claims on cognitive emotional and interpersonal regulation. Meanwhile, the underlying "operating system" itself—which *sets the terms*—of mastery; which shapes our thinking, feeling, and social relating—goes unaddressed.[92]

For leadership development to stick, for organizational leaders to move through stages of any adult cognitive development model, leaders must have more than an awareness of those stages and skills to grow. They must embody the movement and change in themselves. The marks of the higher and more complex stages of leadership development must be integrated into their very identity. PC(USA) pastors as organizational leaders need to be given a chance to expand their vertical leadership capacities as part of clergy formation. Otherwise we offer just one more technical solution to a problem that needs a different kind of answer. Petrie notes that it is especially important for leaders to progress further along the developmental stages in order to "deal with more complexity, see more perspectives and be more aware of their own thinking. For leaders dealing with…overload and complexity, this makes a big difference."[93]

Overload and complexity are words that can be used to describe many PC(USA) pastors' experience of recent years, especially as the church continues to navigate the Covid-19 pandemic and the political undercurrents of a post-2020 world. The goal of using vertical development in dialogue with clergy formation is not to shape all pastors into Tolbert's Alchemists or Kegan and Lahey's leaders with self-transforming minds. Emerging and new pastors are likely to lead in healthier ways with any movement higher

[92] Kegan and Lahey, "Adult Development," 785.

[93] Petrie, "The What and Why," 1.

on the adult mental complexity scales than when they entered their ministry studies and vocational discernment. Rather, an emphasis on vertical development in the Preparation for Ministry Process can equip pastors to better meet the new challenges they face in congregations with new perspectives. Vertical development increases their leadership capacity for any situation, not just the ones that correlate to the specific information they were taught in seminary. Fostering pastors into the higher levels of conventional and post-conventional action logics or stages of mind increases the likelihood pastors will thrive early in their ministry no matter what the state of health and vitality of the congregation. Leaders with more vertical development capacities also positively impact those around them and help their colleagues and organizations in which they serve live into their fullest potential. Vertical development of pastors does not just help clergy thrive and survive; it benefits the entire church.

Fostering Vertical Development

The majority of work in vertical development is within the fields of business and organizational leadership. The church is not a business—our accountability is to God and our work is ministry to people, not to shareholders, profit and product. Even in large, corporate style congregations, leading a church is different than leading a business. Yet aspects of Vertical Leadership Development, particularly the post-conventional levels that promote societal transformation and ethical integrity, are useful as we shape church leaders. Qualities of an effective leader translate across disciplines when applied with appropriate scrutiny. The PC(USA) can use research from settings outside the church to

learn how we might foster and implement vertical development for emerging pastors as part of the Preparation for Ministry Process.

Petrie explains that there are three primary conditions for people to grow vertically; heat experiences, colliding perspectives, and reflection on experiences.[94] Heat experiences have five criteria—they are new experiences, experiences where the results matter, there is a chance of failing, people are watching, and they are uncomfortable. These are situations where leaders are operating just outside their comfort zones. Colliding perspectives involve introducing the learner to new people and ideas. Their assumptions are challenged, and they are introduced to concepts, ideas, and worldviews they would not otherwise have experienced. Reflection experiences take a step back from the heat and collision to process, usually with others, what has happened. This is more than retelling the experience. It serves to integrate the experience in such a way that it ushers in transformation, with the goal of reconfiguring ones values, beliefs, and identity.[95] All three experiences are needed together for vertical development.

Cook-Greuter and Petrie both emphasize, along with critics of Vertical Leadership Development, that development cannot be forced. It must be voluntary. Petrie quotes Cook-Greuter saying, "each stage of development is important and worthy. Horizontal growth within a stage is just as important as vertical growth beyond a stage.

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[94] Nick Petrie, "The How To of Vertical Leadership Development – Part 2: Developing Leaders for a Complex World," The Center for Creative Leadership, 2015, 3, https://www.nicholaspetrie.com/_files/ugd/a8b141_7243e9c83c01457eac15f6cd69073de2.pdf

[95] Petrie, "The What and Why," 2.

Your job is not to force development on someone. Your job is to create the right conditions in which someone *can grow*."[96] This is important to remember particularly when power dynamics and differing cultural values are present in leader and organizational relationships. It is equally as important when applying vertical development to clergy formation, as clergy formation shapes not only one's future and/or current employment but their holistic vocational and spiritual identity.

While it was not explicitly named in the vertical development research I encountered, Vertical Development seems to echo several components of Jack Mezirow's adult transformative learning. Mezirow and his contemporary Patricia Cranton define transformative learnings as "a process by which previously uncritically assimilated assumptions, beliefs, values, and perspectives are questioned and thereby become more open, permeable, and better validated."[97] Transformative learning, like vertical development tries to create environments that challenge learners to hold the complexities of the world through new lenses. "At the heart of Mezirow's learning theory is critical reflection and self-critical reflection—questioning assumptions and perspectives."[98] It typically begins with what Mezirow calls "disorienting dilemmas."[99] Disorienting dilemmas are moments that conflict with the learners previous experience or assumption

[96] Nick Petrie, "The How To of Vertical Leadership Development – Part 2," 5.

[97] Patricia Cranton, *Understanding and Promoting Transformative Learning Theory: A Guide to Theory and Practice* (Sterling, VA: Stylus Publishing, 2016), 2.

[98] Cranton, *Understanding and Promoting*, 50.

[99] Jack Mezirow, "Learning to Think Like an Adult: Core Concepts of Transformation Theory," in *Learning as Transformation: Critical Perspectives on a Theory In Progress*, ed. Jack Mezirow and Associates (San Francisco: Jossey-Bass, 2000), 22.

that create a crisis in meaning. Intentional reflection creates opportunities for these dilemmas to inform new ways of thinking and create new meaning. Reflection and disorienting dilemmas as core components of transformative learning, reflect the learning pedagogy behind the three core vertical development components: heat experiences, colliding perspectives, and reflection on experiences.

In my research, I was unable to find studies that intentionally implemented and measured the outcomes of vertical development on clergy or in church settings. I did find examples of successful use with business leaders, and a specific example applied to public school educators. The particular case study of professional development for public school educators by Deborah Helsing, Annie Howling, Kegan, and Lahey notes:

> It may be that the capacity for self-authorship is therefore a psychological requirement for successfully conducting the adaptive work of change leadership, as it is for many other aspects of modern life (Kegan, 1994). We may unwittingly hold expectations that adults, educators, or even change leaders will automatically processes these capacities, just as a matter of course. However, research with large samples, using a variety of robust measures… suggests that roughly one-half to two-thirds of the adult population of the United States has not yet fully developed self-authorizing capacities (Kegan 1994, 2001). Thus, many change leaders in the education sector likely face a gap between the demands of the role and their mental capacities: These demands are more complex than individuals' ability to meet them. The struggles change leaders may experience in learning to engage these tasks successfully can therefore be viewed as genuinely developmental in nature. For such leaders it is particularly important that they have access not only to professional development opportunities to acquire new skills and increase their knowledge, but also to sources of support and encouragement for their psychological growth.[100]

[100] Deborah Helsing, Annie Howell, Robert Kegan, and Lisa Lahey, "Putting the "Development" in Professional Development: Understanding and Overturning Educational Leaders' Immunities to Change," *Harvard Educational Review* 78, no. 3 (Fall 2008): 440, https://doi-org.ezproxy.bu.edu/10.17763/haer.78.3.888l759g1qm54660.

I'd offer that this same sentiment offered for public educators can be applied with equal importance to clergy as demonstrated in previous chapters.

Whether or not pastors seek to be change leaders, PC(USA) clergy increasingly find themselves ministering in contexts where change and adaptive challenge are constant. Disorienting dilemmas abound. The skills and pastoral identity that were formed and shaped in seminary are not enough by themselves to help clergy lead congregations in the current cultural realities. Pastors need opportunities where leadership for such an environment can be developed, especially as ministry candidates and recently ordained pastors.

Recent Transition into Ministry Feedback on Leadership Development

Ideally a new pastor enters a congregation equipped in both vertical and horizontal leadership development, with a wise mind for shepherding God's people, and the tools to actually do so. In PC(USA) ordination vows we promise to serve the church with "energy, intelligence, imagination, and love."[101] We covenant to serve God and congregation with more than our knowledge and intelligence. To also serve with energy, imagination, and love, we must help our pastors develop their skills alongside developing their own capacity for leadership. Doing so increases their chances for thriving in any circumstance, helping them be responsive to the unique movement of the Spirit in individual congregations. Before offering a way to emphasize vertical leadership

[101] *Book of Order 2019-2021: The Constitution of the Presbyterian Church USA Part II.* (Louisville: The Office of the General Assembly of the Presbyterian Church USA. 2019), W-4.4003h.

development in the PC(USA) Preparation for Ministry Process in the next chapter, I offer here some recent data on newly ordained pastors' experiences with leadership development as they transition into ministry. This research helps demonstrate why the transition from a candidate for ministry into a congregation and ordination is a critical moment for emphasizing this vertical development as pastors shape their new vocational identity.

In 1999, the Lilly Endowment began intentionally funding a series of projects intended to support pastor's transition from seminary into ordained ministry. This grant represents one of the single largest focused efforts to support ecumenical attempts at transition into ministry. The PC(USA) was a major beneficiary of Lilly transition project funds and became a partner through two major efforts: "The Company of New Pastors" and four Presbyterian congregational residency programs. Of all the emerging pastors who participated in these thirty Lilly programs, almost 20% were affiliated with the PC(USA) (123/653).[102] Research on the outcomes correlated to these programs was performed by the "Into Action/Transition into Ministry Study" led by David Gortner, Alvin Johnson, and Anne Burris through Virginia Theological Seminary. A separate study was also authored by the Alban Institute led by its former president James Wind and David Wood affiliated with the Fund for Theological Education.[103]

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[102] David Gortner, Alvin Johnson, and Anne Burris, *Looking Back on What Has Shaped Us: A Summary of Responses from Transition into Ministry Program Participants,* (Alexandria, VA: Virginia Theological Seminary, 2011), http://into-action.net/wp-content/uploads/2013/10/Report-1-Looking-Back-on-What-Has-Shaped-Us.pdf

[103] Since the publication of the study the FTE has changed its name to "The Forum for Theological Exploration." For more information about FTE see www.fteleaders.org.

The Lilly Endowment's investment into new Transition into Ministry initiatives evolved out of increasing awareness of the challenges arising from the critically important transition from seminary student to ordained church leaders at the end of the 20th century, shaped by personal, cultural, vocational and identity formation. Wind and Wood write:

> In contemporary America, a particular set of social and cultural challenges has shaped the transition into ministry in powerful ways. Both the time of preparing for the ministry and the actual transition environment have changed in ways that pose significant challenges…We begin with the recognition of the complex mix of social, religious, cultural, educational, and economic changes that have converged to create a situation that some might call a "double bind." On the one hand, explosions in knowledge, the emergence of American pluralism, a powerful consumer economy, and many other of the classic elements of modernity have exponentially increased what a pastor needs to know to minister effectively in our time. A variety of kinds of knowledge and ways of knowing are now demanded of the entering minister. One side of the double bind, then, is that every entering pastor is being pressured to learn more and integrate more different kinds of knowledge than ever before. At the very same time, the once thick religious subcultures that naturally passed on traditions of ministry and pastoral practice and supported new clergy as they assumed their roles lost a great deal of their formative power as the 20th century progressed. So the other side of the double bind is that the new minister has fewer sources of practical wisdom to draw upon. At the same time that their transition from seminary to first call demands that they learn how to practice ministry in a world of greater complexity and diversity, the communities of practice that their predecessors could count on have disappeared.[104]

The initiatives funded to address this double bind created communities of practice, defined as "groups of people who share a concern or passion for something they do and learn how to do it better as they integrate regularly."[105] In addition to addressing the concern about clergy connection to combat the isolation often felt by newly ordained

[104] Wind and Wood, *Becoming a Pastor,* 13-14.

[105] Wind and Wood, *Becoming a Pastor,* 17.

pastors in first calls, these communities, while diverse in their setting for implementation, were all intentional about integrating mentoring, peer relationships, and congregational engagement.

The feedback in these reports overwhelmingly supports the overarching benefits of the Transition into Ministry Programs. 90% of alumni from the programs say that they would recommend their program to new clergy or new seminary graduates.[106] Participants identified the strongest aspects of the initiatives as positive impacts on shaping their vocational identity, confidence, preaching, perspective, and the way they learned to integrate their experience theologically.

In both the peer cohorts and residency-based Transition into Ministry Programs, participants reported the greatest time and emphasis was spent in three areas: pastoral care, preaching, and Christian education. While this is not surprising information given the emphasis those three areas have in parish ministry and the traditional expectations of congregants and lay leaders, this learning builds on the horizontal development already begun in seminary education. The integrated learning that happens in on-the-ground ministry settings is imperative. It is distinct from the learning in seminary classrooms, and the experience of such skill building under the advisement of a mentor or supervisor in the early years in invaluable. However, it is interesting to note that the areas of emphasis and benefit are not necessarily new areas of learning that can add to the breadth of leadership formation pastors need to thrive in 21st century congregational contexts. In

[106] Gotner, Johnson, and Burris, *Looking Back,* 28.

fact, the vertical leadership development that is missing from traditional seminary curricula and the current PC(USA) Preparation for Ministry Process is an identified weakness of the transition into ministry programs. Gortner, Johnson, and Burris note, "There is weaker impact of these programs…in the development of skills and capacities for management and leadership. Programs were not as strong – nor as focused – on developing capacities for change-leadership, fostering lay networks and leadership, managing and directing overall programs (including budgets), and learning to work with people of different ages."[107] This feedback suggests there is still a leadership development gap that even the programs designed to support pastors as they move from theological education to ordained ministry has not yet addressed.

My own experience with one of the PC(USA)'s Transition into Ministry Programs, "The Company of New Pastors," echoes this data on the benefits and challenges of Lilly's funded initiatives. "The Company of New Pastors" was one of the mentored peer cohorts included in the research conducted by Alban and Into Action. Similar to the programs that received the grant, the goal of the program was to "deepen and sustain the theological foundation of pastoral leaders…for a lifetime of ministry." The structure and rationale for the "Company of New Pastors" was designed "to encourage new pastoral leaders (and their mentors) to engage in daily prayer, daily scripture reading and regular and ordered theological reflection in community with others…Pastoral leaders who are, first and foremost, dedicated disciples can lead

[107] Gortner, Johnson, and Burruss, *Looking Back*, 25.

worshiping communities to be communities of disciples."[108] PC(USA) leaders in the Office of Theology, Formation, and Evangelism hoped to instill habits of Christian practice and deepen discipleship by bringing together mentors and pastors in their last year of seminary through their first formative years in ministry. Those groups spent their time together in the traditional practices that historically laid the groundwork for robust spiritual formation and discipleship that intended to carry pastors long into their careers. They also hoped a pastor who modeled such practices and demonstrated deep discipleship would positively influence their congregation to grow in similar ways.

Cohorts began on seminary campuses during a student's final year before graduation. In my seminary, a small group of students were invited to apply for an even smaller cohort. One challenge with the "Company of New Pastors" was that every student who could have benefited from the opportunity was not able to take advantage of it. We met with two faculty advisors in relaxed settings, usually in their homes. What I remember most distinctly about that first year was our advisors' invitation to begin thinking about ourselves not as their students, but as their colleagues. That shift was significant for my vocational pastoral identity, especially as a first-career seminarian, as it was the first opportunity where I had been invited to see myself as anything other than a student after eight consecutive years of college and graduate school.

[108] "The Company of New Pastors," Office of Theology, Formation, and Evangelism, The Presbyterian Church (U.S.A.), accessed April 30, 2020, https://www.presbyterianmission.org/ministries/theology-formation-and-evangelism/company-of-new-pastors/.

After graduating, cohorts were reassigned based on the geographic area of the participants' new ministry contexts. We gathered for periodic retreats, read assigned books in-between gatherings, and committed to the Christian disciplines fundamental to the program's philosophy. While helpful for my own personal practice and formation, the work of the group felt jarringly disconnected from the questions I was asking in my ministry context. I was looking for a group to help me hold the leadership challenges that seminary did not prepare me for, but what I was offered instead was a group modeled in the study and reflection focuses we had while in seminary. I appreciated the collegiality at a time that was personally challenging as I navigated my unique experience of transition, and others in the group thrived from practicing those disciplines and reflecting in that way with the cohort. It just missed the mark of filling the leadership development gap I was looking to bridge at the time. The PC(USA)'s "Company of New Pastors" slowly disbanded as cohorts completed their covenants and funding ran out, coupled with transition in leadership at the denominational level. Currently the most talked about transition into ministry program at the PC(USA) is the "Recently Ordained CREDO" retreat sponsored by the PC(USA)'s Board of Pensions. "Recently Ordained CREDO" looks at the holistic well-being of clergy emphasizing self-development in vocation, leadership, personal finances, spirituality, and physical health through two week-long retreats. CREDO, however, is not a transition into ministry program that is designed to help pastors integrate their learning with their practice, or further develop their leadership in congregational contexts.

While several programs offered by the PC(USA) seek to help pastors transition well from seminary into ordained ministry, these programs have not addressed vertical leadership development as a core component to help clergy thrive in ministry. Rather, these programs offer helpful components that advance the learnings already emphasized in seminary education or teach new horizontal skills that are useful in particular situations. They do not help pastors be more agile leaders in this rapidly changing ministry landscape of the 21st century.

This chapter explored the theory behind vertical leadership development, and where it can enhance the horizontal development emphasized in the current Preparation for Ministry process. Many of the challenges pastors experience as they transition from seminary into congregational ministry today could be helped if clergy formation moved deeper and higher into the complex thinking that undergirds effective leadership in times of complexity and change. In the next chapter I explore vertical development's place in church formational pedagogy through a theological lens. Using Jesus' formation of the disciples in Mark's feeding narratives, we find that Jesus created situations for the disciples to grow vertically as leaders so they could carry on his work with the Spirit after his death and resurrection. Shaping pastors as Christ shaped his disciples helps pastors grow up into the leaders God calls them to be.

Chapter 3

Jesus Nurtures Vertical Development:

Exploring the Feeding Narratives in Mark 6 and 8

The church looks to the stories of Jesus Christ to shape its understanding of discipleship. Through Christ we learn what God asks the church to do and be as it follows the Holy Spirit today and into the future. We turn to Scripture as the foundation for that understanding. The Presbyterian Church U.S.A states in its Constitution:

> Christ gives to the Church its faith and life, its unity and mission, its order and discipline. Scripture teaches us of Christ's will for the Church, which is to be obeyed. In the worship and service of God and the government of the church, matters are to be ordered according to the Word by reason and sound judgment, under the guidance of the Holy Spirit.[109]

Scripture is essential to Presbyterian identity. The PC(USA) "confess[es] the Scriptures to be the Word of God written, witnessing to God's self-revelation," in a particular time to a particular community, that continues to reveal God's Word to us today.[110] Presbyterian worship and life together is incomplete without incorporating scripture as a guide. Through studying scripture together, we grow in relationship and understanding. In this light, it is important to ground any conversation about Presbyterian clergy formation in scripture itself.

In this chapter, I explore vertical leadership formation through Jesus' relationship with the Twelve in the two core feeding narratives in Mark chapters 6 and 8. I begin by

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[109] *The Book of Order 2019-2023: The Constitution of the Presbyterian Church USA Part II* (Lousiville: The Office of the General Assembly of the Presbyterian Church (U.S.A.), F-1.0203.

[110] *The Book of Order,* W-2.2001.

exploring Jesus as teacher to the disciples in Mark's Gospel and Mark's unique perspective on discipleship. I then use the Feeding of the Five Thousand in Mark 6, followed by the Feeding of the Four Thousand in Mark 8 to demonstrate how Jesus encouraged opportunities for vertical leadership growth among the Twelve.

Why Mark?

The Gospel of Mark offers a story of the revelation of God's love and grace for humanity embodied in the life, death, and resurrection of Jesus Christ, the Messiah. As a Gospel, Mark is shortest in length, the earliest of all the Gospels to be written down, and was originally intended to be shared orally, to a community who had already heard Jesus' story before. The Gospel of Mark focuses less on the factual recording of Jesus life than it does on telling the story of God through Jesus. M. Eugene Boring writes, "To tell the story of Jesus is to tell the self-defining story of God."[111] It is to see God's purposes revealed among us and for us.

Of all the gospels, Mark's story in many ways feels incomplete. It ends abruptly—so abruptly a more satisfactory ending was added many years later by another author. Yet, the unsatisfactory, unfinished story is Mark's invitation. Leah McKell Horton writes, "The "good news" story of Jesus Christ, Son of God, is an ongoing one, continuing into the story of the church's birth and expansion and into the lives of those who meet the living Christ today."[112] The work of ministry today is continuing to write

[111] M. Eugene Boring, *Mark: A Commentary* (Louisville, KY: Westminster John Knox Press, 2006), 3.

[112] Leah McKell Horton, "Mark 1:1-8," in *Feasting on the Gospels: Mark*, ed. Cynthia A. Jarvis and E. Elizabeth Johnson (Louisville, KY: Westminster John Knox Press, 2014), 3.

the next chapter of Mark's story, proclaiming good news of the living Christ among us even here, even now. Pastoral formation is an invitation to participate in that ongoing, unfinished story as shepherds of new flocks of disciples.

Throughout the Gospels, Jesus is often referred to as rabbi or teacher. Evan Hershman notes that Mark uses the Greek, διδάσκαλος, meaning teacher, proportionally more than any other gospel. [113] Yet despite the focus, Mark does not emphasize what Jesus taught. Brian Blount explains:

> Though the Markan Jesus is clearly understood to be a teacher, he is rarely seen enacting any particular content. Rather, he teaches performatively. His actions and words intend more than the conveyance of information. They anticipate responsive activity; they anticipate that his hearers and readers will do something in light of the teachings… It not only informs; it instigates.[114]

Vertical development privileges the shift from formation as imparting content knowledge to formation that transforms the person's worldview, ethos, and sense of self in relationship to what they are learning and experiencing. Mark's Jesus embodies this understanding of vertical formation. The occasions where Jesus does teach explicit content in the Gospel of Mark is often through parable, or in blunt forceful words to those who do not seem to grasp what Jesus is there to do. Jesus focuses on the person. Jesus seeks to transform their understanding of and relationship with God, which in turn

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[113] Evan Hershman, "Jesus as Teacher in the Gospel of Mark: The Function of a Motif" (PhD diss., Graduate Theological Union, 2018), 1, ProQuest Dissertations & Theses Global 13818722.

[114] Brian K. Blount, "Jesus as Teacher: Boundary Breaking in Mark's Gospel and Today's Church," *Interpretation: A Journal of Bible and Theology* 70, no. 2 (April 1, 2016): 184, https://doi.org/10.1177/0020964315622997.

changes the individual—words are the medium, transformation is the goal. Blount continues:

> Every one of Jesus's parables is also, and perhaps primarily *a call to decision* that comes out of the repetition and tension in the text's language. The reader/hearer is not only being *told* something, she is being told to *do* something. That "doing" will push her into the center of spiritual and political confrontation with the institutional forces of her time and place.
>
> As a teacher then, Jesus confronts, engages, and challenges. He provokes his readers/ hearers from where they are to where his teaching pushes them.[115]

It is the Markan Jesus' essential emphasis on the transformation of the hearer that makes this Gospel a helpful lens to imagine ways to shape disciples for ministry.

In telling his story, Mark especially focuses on the relationships Jesus has with different people: the poor and outcast, the disciples, the powerful and religious elite, even demons.[116] Through these encounters listeners learn about the extraordinary grace and unexpected salvation God offers humanity. They learn what it means to follow and believe in the One who reveals this Truth. Many of these relationships in Mark are limited to the single encounters in the story. Jesus' relationship with the twelve disciples in Mark's gospel is different in that it is ongoing; it spans the breadth of the narrative. Their encounters with Jesus are particularly helpful for exploring the ways Jesus equipped people for leadership and service in God's kingdom as they develop over time. Mark's emphasis on the "messianic secret" creates an additional layer of character

[115] Blount, "Jesus as Teacher," 185.

[116] Elizabeth Struthers Malbon, "The Gospel of Mark," in *Women's Bible Commentary*, ed. Carol A. Newsome, Sharon H. Ringe, and Jacqueline E. Lapsley (Louisville, KY: Westminster John Knox Press, 2012), 480.

development for the Twelve.[117] Early in the story Mark reveals to the listener that Jesus is the promised Messiah, but our knowledge stands in stark contrast to that secret revealed much more slowly to those in the narrative. Such separation between listener and characters creates a unique insight as readers watch Jesus' encounters and interactions with people, including the relationship between Jesus and the disciples. A conversation on how Jesus equips others for leadership and discipleship benefits from Mark's character development.

The Gospel of Mark is also a particularly helpful window into exploring leadership formation in Scripture because Mark addresses leadership, power, and conflict in communities. Elizabeth Struthers Malbon notes that Mark's audience may have been mixed Jewish and Gentile listeners of various social classes, "including some leaders of a sub-elite class…who were meant to hear certain warnings about leadership at the same time as members of the lower class were to hear promises of health and wellbeing in 'God's realm.'"[118] While Mark does not address power and Christ's ushering in the topsy-turvy Kingdom of God the way Luke's Gospel does, Mark directly confronts power and leadership to a diverse audience. Mark reveals God's expectations of how leaders, religious and secular, should use their power for Kingdom purposes rather than for their own. He reverses expectations of power and leadership in cultural context both then and now. Explaining the implied purpose of Mark's gospel Boring writes, "as Narrative Christology, Mark's teaching document is aimed at helping the church clarify

[117] Boring, *Mark*, 264-271.

[118] Elizabeth Struthers Malbon, "Mark," 479.

its understanding of the meaning of the Christ event and discipleship to Jesus in a threatening, confused, and conflicted situation."[119] Leaders in the PC(USA) in the 21st century navigating power, privilege, and diversity in our communities can learn much from Mark's teachings.

Jesus Calls the Twelve: Mark 3:13-19a

Mark's understanding of discipleship is broad, and he includes the many crowds who follow Jesus in that category. This inclusivity creates a need to distinguish the word "disciple" from those twelve individuals Jesus call into leadership. Boring notes that discipleship in Mark's gospel is intentionally a broad, inclusive category, of which the Gospel reader is a part, that foresees the future Christian Church. Yet, "the international community just described in [Mark] 3:7-12, an anticipatory picture of the church of Jews and Gentiles in Mark's own time, evokes the question of how the authority of Jesus will be mediated to this community. The creation of the Twelve is Jesus' response."[120]

From the moment Jesus calls "The Twelve," he dedicates a portion of his ministry to equipping these particular disciples for leadership in his footsteps for God's kingdom. Jesus not only wants to embody and proclaim God's Word and message of hope and salvation, but also intends for it to continue when he can no longer be with them. The Twelve help Jesus in that work. However, Mark is not consistent in his language for identifying these twelve closest to Jesus and his teachings. Sometimes he refers to them

[119] Boring, *Mark*, 22.

[120] Boring, *Mark*, 99.

as the Twelve. Sometimes they are apostles. Other times he refers to them as disciples. Boring writes, "Mark has no clear doctrine of apostles or apostleship, but does understand the Twelve to have been called to maintain continuity between the time of Jesus and the time of the church."[121] Mark 3:14 names three purposes for the Twelve; to be with Jesus, to be sent out to proclaim the message, and to cast out demons.[122] They are set apart from the other disciples with these specific purposes. As such, they are also nurtured in their leadership by Jesus in a distinctive way.

The way the Twelve are called and distinguished in Mark's gospel set up an apt scenario for studying how Jesus equipped these leaders as we seek to shape Presbyterian pastors for more holistic leadership, not bound to a particular age or culture, but rather in Christ's timeless wisdom. Boring offers, "The Twelve are not 'promoted' out of the rank of the disciples. Though for Mark they are a distinctive group with a unique function, they do not represent a higher level in a hierarchy—Mark is suspicious of hierarchical imagery among the disciples."[123] Presbyterian clergy, too, are not promoted beyond the rank of other disciples in our congregations. While specifically trained to facilitate the worship life, spiritual formation, and mission of a congregation, Presbyterian pastors have equal voice to the elected lay leaders in their communities. On the Session (the local governing body of the church) pastors are ordained as Teaching Elders, also known as Minsters of Word and Sacrament, with a vote alongside the Ruling Elders, those elected

[121] Boring, *Mark*, 171.

[122] Mk 3:14, NRSV.

[123] Boring, *Mark,* 101.

from within the membership of the congregation. Like the Twelve in Mark's Gospel, Presbyterian pastors are not above those in the congregation whom they serve. They too are called with specific purposes and are equipped for leadership to continue Jesus' ministry in the world after his death. As pastors look to lead in the footsteps of Jesus, Mark's Gospel can show us a model of formation for such leaders.

Vertical Leadership in the Feeding Narratives of Mark 6 and 8

Jesus has several opportunities where he intentionally teaches the Twelve on his journeys in Mark's Gospel. I have chosen to focus exclusively on the two feeding narratives in Mark 6 and 8 as case studies for two reasons. First, these are well-known, memorable stories in scripture. The feeding miracles are familiar to most in the Christian tradition, and one can listen to and imagine the scene with details unfolding between Jesus and the disciples in these stories. While listeners may be challenged to relate to the disciples' experiences in other Markan narratives, one does not need to be familiar with the landscape and culture of the Ancient Near East to relate to being asked to feed more people than you were expecting for dinner. We can connect more easily to the Twelve's reactions to Jesus' request than some of the other stories in Mark.

Second, these narratives are related in their content, but also in their location and function in the Gospel. Mark 6 begins a pericope while Mark 8 ends it. Chapter 8 also concludes the first of three main sections, the section centered around Jesus' ministry in Galilee, in Mark's Gospel.[124] These stories are close enough together that the listener or

[124] Elizabeth Struthers Malbon, "Mark," 480.

reader can see a progression in Jesus' interactions with the Twelve, and relate in such a way that they have a shared movement toward Jesus' revelation of himself and God's reality in Mark.

Reviewing the Conditions for Vertical Leadership Development

Before diving into the stories, it is important to review the three primary conditions for leaders to grow vertically as addressed in the previous chapter: heat experiences, colliding perspectives, and reflection on experiences. Petrie explains that leaders grow up through the stages of vertical development most quickly when they have experiences that are new, "where results matter, where there is a chance of failure, where people are watching, and where it is extremely uncomfortable."[125] Heat experiences are enhanced when the perspectives of others who think differently and offer perspectives beyond one's own collide in the process. Reflection is a time to make sense of these new experiences, learn new lessons and "reconfigure [one's] values, beliefs, and identity."[126] Without all three of these conditions, leadership growth may occur, but it is unlikely leaders will grow deeper within stages and into higher and new stages of consciousness. The goal of Vertical Leadership Development is to help leaders to reach their fullest potential by expanding their mental capacity, so they are more equipped to handle the complexities of the rapidly changing, intense, and complex "VUCA" world today.

[125]Petrie, "The What and the Why," 2.

[126] Petrie, "The What and Why," 2.

Mark 6

Mark 6 begins with Jesus' rejection in his hometown in Nazareth where he does few "deeds of power," compared to previous chapters filled with miraculous healings and miracles. Jesus was "amazed at their unbelief," in Nazareth.[127] He then travels with the disciples among the villages of Galilee teaching, and sends the Twelve out, two-by-two, to cast out demons, preach repentance, and heal. This is the first instance Mark reports the Twelve being sent out by Jesus. While the Twelve are on their mission from Jesus, Mark changes scenes to tell the story of the death of John the Baptist—John who opened Mark's gospel and proclaimed Christ's coming. This harrowing scene of John's beheading sets the stage for the Feeding the Five Thousand.

The events leading up to the Feeding of the Five Thousand beginning in Mark 6:30 raise the tensions of the Twelve. Presumably they are tired and in awe of what they have done and experienced on their teaching and healing mission. The news of John's death is disturbing. Mark alludes to their stress as Jesus invites the Twelve to "come away to a deserted place… and rest…[for they had no leisure even to eat]."[128] They depart by boat for solitude with Jesus, and possibly a chance to reflect on their wildly new experience and encounters.

But the people, enamored by Jesus' teaching and miracles, beat them to their destination. When they arrive, there is a great crowd. Jesus, is moved by his compassion

[127] Mk 6:6, NRSV.

[128] Mk 6:31, NRSV.

for the crowd "because they were like sheep without a shepherd; and he began to teach them many things."[129] The disciples do not get their solitude, their rest, or their food.

As time passes, the Twelve approach Jesus, and remind him that it is late, they are in a deserted place, and all these people who have been listening to him teach will be hungry. The Twelve are hungry. They suggest to Jesus that he should send them to the surrounding villages to buy something to eat. But Jesus says to them, "You give them something to eat."[130] In that moment, Jesus creates an opportunity for the Twelve to strengthen their holy leadership capacities. This is a heat seeking moment. It is presumably a first-time experience, or we might expect the disciples to have been more prepared if they were regularly feeding the crowds that gathered to listen to Jesus. The results matter, for thousands of people are hungry. There is a chance of failure (they are likely wondering if there is any chance of success!). It does not take much imagination to see this as an extremely uncomfortable experience with lots of hungry eyes focused their way as the disciples realize they do not have enough money to feed all the people gathered.

The disciples cannot see a way through the challenge facing them. They reply, "Are we to go and buy two hundred denarii worth of bread and give it to them to eat?"[131] They see the lack of their own resources. They see the limitations in front of them. They do not even think to start with the food they had brought for themselves. Jesus creates a

[129] Mk 6:34, NRSV.

[130] Mk 6:37, NRSV.

[131] Mk 6:37, NRSV.

situation for the Twelve where they reach a limit on what their skills and experience can offer. Rather, they must think, feel, and act in new ways if they are to rise to Jesus' challenge.[132]

The Twelve are stuck. They are bound by the limitations they perceive in the scarcity of their resources given so many people and needs. When they cannot find a way forward, Jesus steps in to help the Twelve. Rather than fixing the problem himself, Jesus facilitates this miracle and engages the disciples in the process. Jesus asks, "How many loaves have you? Go and see…"[133] They return with a report. Five loaves. And also two fish! The Twelve take one small step forward, thinking beyond just the bread they were told to find and offer something new with which Jesus can work.

Jesus then tells the Twelve to gather the people into groups on the grass. The image of green grass and sheep without a shepherd, likely conjures up memories for the disciples as well as Marks listeners, of the familiar 23rd Psalm.[134] It is possible they relax as little, as they go about doing as Jesus asks, separating the people into groups by fifties and hundreds. They watch Jesus as he takes the loaves, praises God for them and breaks them, and hands them to the disciples to give to the people.[135] Jesus also divides the fish for them to distribute. Five thousand men ate and were filled.[136] The Twelve then collect

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[132] Petrie, "The What and Why," 1.

[133] Mk 6:38, NRSV.

[134] Paul W. Walaskay, "Mark 6:30-44," in *Feasting on the Gospels: Mark*, ed. Cynthia A. Jarvis and E. Elizabeth Johnson (Louisville, KY: Westminster John Knox Press, 2014), 185.

[135] Boring, *Mark,* 181.

[136] Mk 6:39-42, NRSV.

twelve baskets of broken pieces and fish remaining. Immediately, Jesus and the disciples leave the crowds and go onto Bethsaida.

In this story, Jesus invites the Twelve to a situation that has the primary elements to support vertical development. The high stakes and visibility of the experience create an environment which turns the heat on the leadership moment. Their own experience and perception of what it takes to feed large groups of people clashes with Jesus' expectations and experience about what is possible in the moment. Leaving the crowd behind with Jesus after collecting the leftover baskets, there is a moment to reflect on that experience, an opportunity to reconfigure those values and beliefs—ultimately an invitation to reshape their identity in light of what Jesus reveals about who he is, about God, and God's economy.[137]

Not every experience that contains the components to foster growth vertically results in monumental shifts in ones thinking, worldview or leadership, however. Movement through the stages of adult consciousness or mental complexity takes patience and intention. Recognizing movement deeper into a stage is as important as transcending into a new one. As the data revealed in Chapter Two, few people ever reach the highest stages of development. Yet, each experience is important, compounding impact over time. Scripture is clear the disciples do not show any lasting discernable development and understanding from the Feeding of the Five Thousand. Immediately following the story, Jesus takes the Twelve away on the boat and sends the crowds home. Reflecting on the

[137] D. Cameron Murchison, "Mark 6:30-44," in *Feasting on the Gospels: Mark*, ed. Cynthia A. Jarvis and E. Elizabeth Johnson (Louisville, KY: Westminster John Knox Press, 2014), 186.

experience of the loaves and fish could have changed what they thought about Jesus, God, and their place in this story. Rather, when their boat is caught by strong wind in the morning, and Jesus walks across the lake toward them, they are terrified and think Jesus is a ghost. They do not associate the miracles they have experienced with Jesus thus far with the Creator who has the power to command the wind and waves. Mark relays, "Then [Jesus] got into the boat with them and the wind ceased. And they were utterly astounded, for they did not understand about the loaves, but their hearts were hardened."[138] They cannot see that Jesus who offers bread and fish, blessed and broken, is the same One who offers life on perilous seas, the One who ultimately offers eternal life in himself, blessed and broken for the forgiveness of sin.

Mark 8

Two chapters later, Jesus and the disciples are in a new community after Jesus heals and cast out more demons and converses with the Pharisees about traditions, the law, and holiness. Jesus is teaching another hungry crowd, most likely comprised of Gentiles rather than Jewish hearers in Mark 6. This time the crowd has been with Jesus for three days with nothing to eat. Jesus again has compassion for the crowd, fearing they will not make the journey home without food. The disciples challenge Jesus' intention to feed the crowd in the bareness of the desert. It seems they do not remember what happened with the hungry crowd just two chapters earlier. Jesus once again asks the disciples to take stock of what is available—seven loaves, and a few small fish. Jesus

[138] Mk 6:51-52, NRSV.

gives thanks and breaks the bread and gives the bread and fish to the disciples to distribute among the crowd. “They ate and were filled; and they took up the broken pieces left over, seven baskets full.”[139] Four thousand people are fed, and then immediately Jesus and the disciples get back into the boat.

Once again, Jesus pushes the disciples into an environment with the elements of heat experiences, colliding perspectives, and reflection—a situation primed for the disciple’s development. While it may seem remarkably similar to the Feeding of the Five Thousand, the Feeding of the Four Thousand is with a different community of people and in a new place—likely with Gentiles whose values were different than their own as Jews.[140] Again, the Twelve find themselves in an uncomfortable situation, with people hungrier than before. The outcome matters, not only because Jesus desires to feed the people, but because it is unlikely they will survive the journey home after three days without something to eat. Jesus concludes the event by ushering the disciples into the boat, time set apart during which they can reflect on all they experienced that day and the days leading up to it.

Paul Walaskay writes:

> Jesus once again takes a postbanquet boat ride with his disciples. They are still kvetching about bread; there had been seven baskets of leftovers, and no one remembered to bring any bread on board the boat. Jesus reminds them about their two experiences of sharing bread with thousands of people, with plenty of bread left over. Jesus pointedly has the disciples recall that there were *twelve* and *seven* baskets of leftover bread. Jesus was willing to feed all who come to him, both

[139] Mk 8:8, NRSV.

[140] Boring, *Mark,* 219.

> Jews (e.g. descendants of the twelve tribes of Israel) and Gentile (seven is the number of all creation). Then he says to them, "Do you not *yet* understand?[141]

The Twelve do not yet understand. They cannot yet grasp the abundance of God's grace and love for all who seek God. They are left stuck with what they know, unable to move past that reality to imagine what God's kingdom can truly be. They miss their role as an integral part of the story unfolding through Jesus right before their eyes. At this point they certainly have not grasped that they will be the ones responsible for continuing Jesus' ministry when he is no longer with them.

At first glance, these stories may seem like Jesus' attempts at teaching and forming the disciples have failed. Twice they fail to connect the health, wholeness, and compassion Jesus demonstrates in his healing miracles and feedings with the creating God who offers wholeness and compassion to all. Twice they failed to notice that they have a role to play in this work alongside Jesus. And twice they failed to take the leftovers with them, an apt metaphor for their inability to glean what Jesus hopes they will learn from these experiences. But Jesus' work with the Twelve in the Feeding of the Five Thousand and Four Thousand show fruit in Peter shortly after. Only a few short verses later, Jesus asks the disciples "Who do people say that I am?"[142] Several disciples answer that he is a prophet, maybe even Elijah or John the Baptist himself. But Peter declares, "You are the Messiah."[143] Something has shifted in Peter. And what he begins

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[141] Paul W. Walaskay, "Mark 6:45-52," 193.

[142] Mk 8:27, NRSV.

[143] Mk 8:29, NRSV.

to understand will shortly be confirmed on the Mountain with Jesus, James, and John in Jesus' transfiguration. While it is not realized immediately, these intentionally developmental experiences Jesus has with the disciples eventually break through.

Mark's Ending is Our Invitation

The Gospel of Mark ends with the empty tomb and the women who find it running away in fear and amazement, without telling anyone what they see or hear. This holy story of hope and new life ends with fear and confusion. It is not neat or clear. It leaves the listener or reader wondering, did Jesus' teachings work at all? What is going to happen if the women don't tell Peter where to find him? And Mark intends for it to end this way, for this story is ours to finish.

Mark is as much of a teacher as the Jesus he offers us. Hershman writes, "the image of Jesus as teacher is often used to address the Gospel audience; the character of Jesus frequently breaks the fourth wall, so to speak, to address the audience even when he seems to be talking to characters in the story, like the disciples.[144] Mark wants those of us with ears to listen.[145] Jesus who calls the disciples to a new understanding, to a new relationship with God, to a new way of life healing, teaching, and proclaiming the Good News, calls us to do the same. Jesus wants us to know the abundance of God's mercies, the reconciling of diverse peoples under Christ's name, the forgiveness of sins that comes to us through God's son. Jesus wants us to realize that the Kingdom of God isn't a faraway place, it's right here if we let it be.

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[144] Evan Hershman, "Jesus as Teacher," 27.

[145] Mk 4:23, NRSV.

As a pastor, and as someone with responsibility to support new clergy as they begin their journey in ministry, the Gospel of Mark gives me hope. In Mark I see Jesus' closest disciples dramatically miss the point of what Jesus is teaching them. But I also see Jesus who creates opportunities for them to learn and transform in powerful ways, with patience and support until they figure it out. I am grateful that the disciples get to the end of the Gospel, and it seems they still have not completely understood. The Gospel of Mark ends with uncertainty about what will happen with the news that God's love has conquered even death in Christ's resurrection, which feels similar to the uncertainty the church faces now in continuing that proclamation. We don't know. We do not know what will happen to the church in the 21st century. We do not know what the future of the Presbyterian Church U.S.A will look like, nor what pastors will need as they lead congregations in this liminal time. But we do know that the Good News transcends our unknowing. Somehow, someway throughout history God has used imperfect people to share God's love and Christ's teachings with others. And we are not alone. God has sent the Holy Spirit who dances ahead of us to equip us and point us to those opportunities to grow—to deepen our understanding, to challenge our worldview, to handle complexity—to point us to the One who is the source of all our knowledge from the beginning.

Following Jesus' lead in shaping disciples, in the next chapter I offer an attempt to bridge the current gap in vertical leadership formation in the PC(USA) Preparation for Ministry process through a framework for creating peer-learning cohorts that are intentionally developing leaders vertically within presbyteries. Forming pastors for ministry starts with remembering that we are first and foremost disciples of our teacher,

Jesus Christ, who patiently challenges us until we claim the love of God, self, and others that he has been trying to teach us all along.

Chapter 4

A Model for Vertical Development within Presbyteries:

Emerging and New Clergy Peer-Cohorts

With Christ as our teacher and the Holy Spirit our guide, disciples will continue to share God's redeeming love with those who are open to receiving it. The resilience of Christian hope should astound and inspire those of us who are called to proclaim God's promises in this uncertain time in which we find ourselves. The church as an institution has experienced countless transitions and changes since its beginnings two thousand years ago. The Spirit is never stagnant. Trusting both that the church will change and that its mission will continue as it has found a way for centuries, those who lead congregations must be equipped to lead through this liminal time.

For decades, the current PC(USA) Preparation for Ministry model sufficiently formed pastors for congregational ministry for a time when mainline Protestant churches as institutions thrived. PC(USA) Clergy were trained as professionals. Pastors do need the professional skills the church has come to associate with ordination as a Minister of Word and Sacrament/Teaching Elder. Yet, as time moves deeper into the 21st century those skills alone are not enough to meet the rapidly changing needs of today's world marked by pandemic, polarization, and individualism. As we move into what Smith identifies as the Age of Authenticity, the ways the church prepares clergy and what is prioritized as part of their formation must adapt with it, to help clergy have the best chance of thriving in ministry alongside their congregations.

In this chapter, I propose clergy peer learning cohorts located within presbyteries as a bridge in the PC(USA)'s Preparation for Ministry Process that offer an opportunity for vertical development amid a horizontally oriented existing system. I begin by first exploring the three title features of this cohort: new and emerging pastors, presbytery-based, and peer-learning cohorts. I share the reasons for designing these cohorts to bridge the gap between seminary and first congregational call, for locating them in presbyteries, and basing them in peer-learning. I then describe the cohort in dialogue with the three key components that foster vertical development (heat experiences, colliding perspectives, and reflection), Marler's research on clergy-peer cohorts, and Mezirow and Cranton's Adult Transformative Learning Theory. I conclude with ways to evaluate the effectiveness of cohorts in promoting vertical leadership and whether they begin to bridge the gap in the current Preparation for Ministry Process.

Emerging and New Pastors – Offering a Bridge

This cohort is designed for presbytery ordination candidates from the semester they begin their first seminary congregational contextual education placement up through their first five years of ordained ministry. The PC(USA) has long identified a critical gap between seminary and a pastor's ordination beginning with a first ministry call. The 2000 final report of the PC(USA) General Assembly Council appointed workgroup on the "Entrance into Pastoral Ministry," offers a multifaceted recommendation for robust support for first-call pastors. In the rationale for the recommendations it reads, "[The] proposal deals with what is widely considered to be a major gap between seminary

education and the actual practice of leading a congregation…difficulty in bridging this gap is obvious enough to elicit attention from numerous sources."[146]

This time of significant transition in a pastor's life comes with exceptional challenges. The workgroup identified several of those challenges emerging from the difference between seminary as a school and a congregation as a church. In seminary, a ministry candidate is measured on their academic performance and interactions as part of seminary life, as compared to a congregation who now measures success based on their leadership, preaching, personality, program management and ability to attract new members. A seminary orders the majority of a candidate's responsibilities by institutional expectations, compared to the congregation where the pastor has much more autonomy and the new pastor is often expected to direct much of the church's responsibilities and priorities.[147] The report also identified a lack of leadership-style awareness among new pastors leading to clashing styles and expectations with the congregation. At the time of the report, fifty-one percent of the phone support consultations offered by the Board of Pensions (the denomination's pension, benefits, and well-being office, including medical insurance and mental health care) were from "new pastors who report loneliness, alienation, conflicts in the congregation and financial problems."[148] The challenges posed

[146] Phil Gehman et al., *Final Report of the Work Group on the Entrance into Pastoral Ministry* (Louisville, KY: General Assembly Council of the Presbyterian Church (U.S.A.) 2000), 11.

[147] GA Council, Final Report, 11-13.

[148] GA Council, Final Report, 11.

by this transition from theological education to congregation negatively impact the well-being of both the pastor and their congregation.

The Committee on Preparation for Ministry (CPM) design widens in the gap between theological education and first congregational call as well. The CPM walks with a candidate for ministry from the moment their congregation affirms an individual's call to begin ordination discernment through the CPM process until they are certified ready to seek a call in PC(USA) congregations, effectively completing their CPM journey. This relationship is a mandatory minimum of two years, but is often a much longer process and relationship—for example the M.Div degree alone takes three-years of full-time coursework to complete in most institutions. The CPM Advisory Handbook is explicit in reminding its committees of their responsibility to partner with a candidate they have certified until they find that first-ordained call.[149] Yet, often that certification is seen as a moment of completion, and little accountability between the candidate and the committee exists for continued formation as they seek and begin that first call. Once a pastor finds that call, they are now under the jurisdiction of an entirely new committee, the Committee on Ministry (COM), who supports pastors and congregations within the presbytery.[150] Adding to the gap, often that congregation of call is within the geographic bounds of a different presbytery. Not only is a new pastor transitioning from student to

[149] Timothy Cargal, *Advisory Handbook on Preparation for Ministry 2.1*, (Louisville, KY: The Office of Mid Council Ministries of the General Assembly, December, 2017), 54. https://www.pcusa.org/resource/preparation-ministry-handbook/.

[150] It should be noted that a few presbyteries across the United States are experimenting with combining their CPM and COM into the same committee. In theory this would provide more continuity for new pastors as they move into first calls, if the congregation of call is within the same presbytery.

minister, from CPM to COM, but they are also transitioning their home, relationships, and life to serve God through ordained congregational ministry. Sometimes new pastors slip through the gaps and do not get the support they need at this critical developmental time.

The PC(USA) is not the only denomination to identify the challenges in this gap between seminary and first congregational call. *Into-Action*, the report of the Clergy into Action Study which studied the effectiveness of Transition into Ministry Programs across denominations from 2010-2013 writes:

> Many new pastors and priests struggle in their first church positions, and are not sure where to turn for solid support, help, and growth as they strive to develop a healthy pastoral identity, cope with the demands of ministry, and refine their capacities for leadership. As a result, some promising young pastors become frustrated and drop out of ministry within the first few years of their service—and many more strongly consider leaving the ministry. New, inexperienced clergy may also slip into leadership styles and practices that are actually detrimental to congregational life—behaviors that become ingrained habits over time, unless mediated by additional guidance or training.[151]

Offering support to pastors as they begin their first congregations is crucial to increase the likelihood that they will thrive in their first call. A program that is specifically designed to develop leadership capacities and create opportunities for vertical development expanding one's worldview and ability to navigate complexities and competing values, adds new depth to already existing Transition into Ministry programs as explored in Chapter 2.

[151] "About Us," Into Action: Portal for Discoveries from the Clergy into Action Study, accessed August 3, 2020, http://into-action.net/about-us/.

Why not, then, begin a cohort with pastors once they have received their first call as many other programs do? I have designed this cohort to be available to candidates in a presbytery, beginning with their congregational contextual or field education placement, to help lessen the leap between one world and the other. The space between the end of the CPM process and early ordination is a time when pastors can get stuck or lost in transition—a time when excitement is high, but anxiety can be high too. By placing candidates in covenant community with new pastors, interns can begin seeing and thinking of themselves as pastors and not only students. They can begin to encounter the questions that are emerging from their recently ordained colleagues and test out viewing their ministry context through that insight. Newly ordained pastors are also able to offer wisdom to their candidate colleagues, helping the newly ordained pastor further embrace their new identity as pastoral leader. Both emerging ministry candidates and newly ordained pastors have gifts, skills, and experiences they can share with the cohort regardless of ordination status.

The Lilly Endowment's Thriving in Ministry studies have shown:

> The first years of pastoral leadership are critically important to develop habits and practices for ministry that carry through the pastor's whole career. It is largely through the daily practice of ministry that pastors hone an imagination with a particular way of perceiving, understanding and relating to the world that involves substantive engagement with Scripture, theological traditions, human experience, congregational life and the larger world.[152]

[152] "Request for Proposals," Lilly Endowment Thriving in Ministry Initiative 2018, Request for Proposals, accessed January 26, 2022, http://lillyendowment.org/wp-content/uploads/2018/01/lilly-endowment-thriving-in-ministry-initiative-2018-request-for-proposals.pdf.

Related research from the study also reports, "the majority of clergy indicated that individuals and situations post-seminary were most influential on their development. Only 12% selected seminary or divinity school as their most significant influence."[153] The current ministry preparation model overlooks those immediate moments beyond the conclusion of the formal CPM process that may be the most fertile time for transformation. This is the time to emphasize vertical leadership development, which cannot all be achieved in school or measured by an exam. The presbytery can be intentional in ministerial formation from field education through the first years of ministry. Most pastors already say that their greatest development happened after graduation. The presbytery can make those years in seminary field education more intentional and the learning post-seminary less accidental. It can oversee a system of ongoing education that builds horizontal skills not developed in seminary and the vertical leadership capacities necessary for ministry today. Expanding the cohort to include pastors with up to five years of ordained ministry develops the groundwork for a life-long commitment to continuing education and support networks. It may also catch anyone transitioning quickly through a first, second, or even third call within those first five years.

[153] David Gortner, "Post-Seminary Training Rated Higher for Clergy Formation," Into Action: From Seminary into Ministry, accessed July 15, 2020 http://into-action.net/research/post-seminary-training-rated-higher-for-clergy-formation/.

Presbytery-Based Process

Presbyteries are the entities with primary responsibility for managing the ministry preparation process through their CPMs, and with ears on the ground in congregations through COM. Thus, they can step into this gap, and intentionally support emerging and new pastors between seminary and early ordained calls. Of all the entities involved in ministry preparation, presbyteries are small enough to be responsive and agile, but hold enough power in the system to enact change.

While seminaries and theological schools are the focus of academic preparation, the presbytery is responsible for seeing that candidates meet all the other requirements for ordination in *The Book of Order*, including those that are difficult to measure, like wisdom and maturity of faith or sound judgement. It specifically gives presbyteries responsibility to measure a candidate's leadership skills as evidence of readiness for ordered ministry.[154] Presbyteries are the bodies that discern and confer ordination. They work with the congregations that extend calls. They are intricately involved with every aspect of the process aside from teaching seminary courses and administering ordination exams—ironically the two parts of the preparation for ministry process that get the most attention. Presbytery cohorts that begin with their seminary students would give a space to get to know their candidates for ministry better. This also creates an environment where presbyteries are coming alongside candidates and emerging pastors to truly support their development.

[154] *The Book of Order*, G-2.0606.

Presbyteries also know the unique flavor of their local context and know what resources are available locally to support their pastors. So much of ministry is contextual, from theological interpretation, to tradition, to even language, and presbytery-based cohorts can support their pastors in a way that others may not understand based on that context. National groups like some of the past Transition into Ministry Initiatives supported by the PC(USA) are helpful and serve their own purpose. But resourcing and staffing at the General Assembly or Presbyterian Mission Agency level tend to limit how many pastors have access to the program its stustainability. The national office balances many priorities and funds—they are unable commit with longevity to the investment in the local pastor the same way a presbytery can.

Another benefit to locating these cohorts within a presbytery is the natural connection and investment that is created between the presbytery and the pastor or soon-to-be-pastor. In the PC(USA), Ministers of Word and Sacrament are members of the presbytery in which they serve. They are not members of the local congregation. Their voice and vote in our presbyterian process occur at this mid-council presbytery level. Presbytery-based cohorts offer a chance for pastors to begin participating in their presbytery's life from the very beginning of their time in ministry. It sets an expectation for themselves and for the congregation they serve that part of their ministry call is to be active in the life of their presbytery, which is effectively the pastor's congregation. Here, new and emerging pastors begin to develop relationships with other clergy colleagues in the presbytery who may become resources and support in the future. It also is an open door to leadership positions on committees and commissions within the presbytery that

can further hone leadership skills and their pastoral identity beyond the local church. In my own presbytery, more than half of the cohort's newly ordained participants agreed to serve on a presbytery committee or its leadership team within two years of beginning the cohort. This service benefits both the pastor and the presbytery.

Presbyteries are the only body in the PC(USA) positioned to oversee the long and complicated process of preparation for ministry and transition into first calls. Presbyteries can approach the dance as a whole movement from beginning to end, and how it flows into the next song. Presbyteries can see themselves not as gatekeepers and process managers, but instead as educators, equippers, and connectors.

Peer-Learning Cohorts

I considered several different models while designing this cohort—mentor-focused, curriculum-based, retreat-centered, self-directed, and peer-learning. Ultimately, peer-learning cohorts embodied the essential component of vertical development, while also de-centering pastoral formation from the academic focus of the current professional-based Preparation for Ministry process. Peer-learning put the onus of the work on the learners themselves, creating a deep investment in their work as well as their relationships. A facilitator is still necessary for the group, but is not the generator of the group's content, purpose, or energy. Peer-learning cohorts also honor adult learning pedagogy, specifically adult transformative learning, which I sought to incorporate in this project.

In her book, *So Much Better: How Thousands of Pastors Help Each Other Thrive*, Penny Long Marler writes,

> When adults have a say in what and how they learn, their motivation is higher and the practical payoff greater…Adult learners are active learners. They are less interested in learning about something than figuring it out… This kind of creative and adaptive learning is more likely to happen in a world outside of a traditional classroom…It is also more likely to occur when learning presents significant challenge, as, for example, when new insight or experience leads to a reevaluation, or even revision of previous assumptions. This kind of learning is revelatory.
>
> Previous studies of clergy peer groups demonstrate the power of andragogy [adult learning]. Members choose to participate. They have a lot of say about what the group explores, how they do it, when, and where. They express strong appreciation for learning from the experience of others. They develop trust and accountability. Together they are more creative and resourceful.[155]

Marler studied pastor peer-cohorts and found that they truly make a difference in the lives of the pastors who participate in them. She offers that her research demonstrates that pastors who participate in peer-cohorts sustain healthier habits and leadership in ministry, while at the same time positively influence their congregations.

Marler grounds her pedagogy in Jack Mezirow's Transformative Adult Learning Theory, an early springboard for vertical development's beginnings. Patricia Cranton also builds off of Mezirow's work as she identifies characteristics that exemplify adult learning: the voluntary and collaborative nature of adult learning, adults' preference for self-direction, the importance of meeting practical needs, the role of adults' experiences in their learning, the relevance of self-concept, and the emphasis on learning styles.[156] The cohort builds on these characteristics and emphasizes the disorienting dilemmas and

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[155] Penny Long Marler, *So Much Better: How Thousands of Pastors Help Each Other Thrive* (St. Louis, MO: TCP Books, 2013), 5-6.

[156] Patricia Cranton, *Understanding and Promoting Transformative Learning Theory: A Guide to Theory and Practice* (Sterling, VA: Stylus Publishing, 2016), 14.

heat experiences, while offering peer and mentor support to help emerging and new clergy bridge the gaps in their more knowledge-based pastoral formation. They learn not simple basic movements, but how to strengthen their capacity to fluidly dance with the gifts the Spirit has given them for wherever God calls. This early ministry cohort models that pastors are the agents of their own learning. Growing and thriving in ministry is supported by prioritizing the opportunities for continued learning and health in their vocation, encouraging seeking out resources and colleagues to support their ministry journey beyond these first years.

Marler's work is also helpful in identifying common rhythms that are present among impactful clergy cohorts: covenant, challenge and confrontation, cohesion, and commission. She notes, "not coincidentally, they reflect the rhythm of the first-century disciple model and the core features of andragogy."[157] Covenant establishes group norms and relationships within and outside the cohort, linking pastors to the covenantal history of disciples who have come before. Challenge and confrontation mirror the heat-seeking and colliding perspective elements necessary to foster chances for vertical development to occur. Cohesion occurs when the trust and purpose of the group intersect encouraging the cohort to go deeper. Commission describes how group members take their learning back with them into their lives and work and connect their pastoral identity to God's mission.[158] I try to incorporate these four rhythms into the presbytery cohorts developed here.

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[157] Marler, *So Much Better,* 14.

[158] Marler, *So Much Better,* 13-16.

Model for Presbytery-based Peer-learning Emerging and New Clergy Cohorts[159]

Here I offer a model for peer-learning cohorts within presbyteries for emerging clergy (CPM candidates) and new clergy designed to bridge the gap in the PC(USA)'s Preparation for ministry process. This model seeks to foster an environment that creates opportunities for vertical development as well as the opportunity to enhance horizontal skills and knowledge identified as important by the cohort.

Who Is Involved in the Cohort?

The important determining factors for participation in a presbytery peer cohort are status as a candidate about to begin or a pastor who recently began ordained ministry, as addressed earlier in this chapter. These cohorts presume mixed representation in age, gender, and racial identity given the demographical statistics of those entering the PC(USA)'s ordination process today. While it is assumed most cohort participants will be serving congregations, a call to traditional congregational settings is not a requirement to participate, as long as the call-setting is validated (or would otherwise be validated in the

[159] The initial ideas for the contours of this cohort stem from "NewLead Cohort" in the Presbytery of Donegal. I must gratefully acknowledge the work of The Presbytery of Donegal's Executive Presbyter, the Rev. Dr. Erin Cox-Homes, and Stated Clerk, the Rev. Dr. Michael Wilson, who first planted the seeds for this idea. Dr. Cox-Holmes began, in her own words, a "those who are new-er to ministry and those who want to think in new ways about ministry" cohort in their presbytery. They invited me to help initiate it in its infant stage in 2015 along with my colleague Rev. Scott Szabo. My early ministry benefited greatly from working with this group, and their mentorship. My project adapts their cohort model as NewLead has few specific requirements for participation and existed in various forms throughout the last seven years. NewLead was not designed specifically to support entering first calls, however the presbytery has had many candidates in NewLead who have participated through receiving their first congregational call. It was watching those transitions and seeing the support the cohort provided that first sparked my imagination for this project.

case of field education) by the presbytery.[160] Diversity supports vertical development creating more opportunities for colliding perspectives.

The ideal cohort size is between six and twelve people. In the Presbytery of Donegal, six seems to provide critical mass where one or two people can be absent and yet the group still offers a collegial group feel and robust conversation. Twelve are still able to fit around a large table and models Christ's own cohort size for the chosen disciples. As many presbyteries in the PC(USA) have a small number of candidates and new-to-ministry clergy within their bounds, most presbyteries will likely be able to offer one cohort. Leaders in larger presbyteries with many individuals interested in this model can create multiple cohorts. Presbyteries without enough participants can agree to combine cohorts with a neighboring Presbytery if geographic bounds permit. Ideally this group will meet in person, but there are ways to leverage technology and still accomplish these goals by bringing people together across distance if necessary. All participants will need to agree to a covenant of confidentiality and community created norms for participation.

Participation in a cohort must be voluntary. It is important that participants be encouraged into this cohort rather than mandated. Cranton notes that transformational learning is voluntary.[161] One cannot be forced into transformation. Similarly, once

[160] A validated ministry designation is given by the presbytery to ordained pastors serving in calls in non-traditional roles or settings beyond congregations, that still qualify for membership in the Presbytery according to the *Book of Order* [G-3-0306].

[161] Cranton, *Understanding and Promoting,* 6.

someone decides to participate in the cohort, they are not binding themselves to a multi-year contract. While the process works best with consistent participation and benefits from continuity, the design of the cohort has enough fluidity for people to move in and out when necessary as long as a core of the group is committed. Participation incentives, however, are encouraged. In the Presbytery of Donegal participants are offered $500 for continuing education upon attending eight cohort meetings within a year. Other incentives may include nice meals and beverages provided at cohort lunches, reimbursed childcare, a book allowance, or pulpit supply for a respite Sunday. Presbyteries can be creative with incentives based on their available resources. When participants have the motivation to engage, it is more likely they will set aside the time and protect it. Presbyteries can also encourage new pastors negotiating clergy contracts within their bounds to include this cohort time as part of their work hours. A congregation's support of this program benefits not only their pastor, but the congregation with healthier, stronger pastoral leadership.

In addition to the participants, each cohort is facilitated by a trained clergy coach, experienced mid-council leader, or a pastor appointed by presbytery leadership. The facilitator functions as a coach for the cohort.[162] They are a guide to help the cohort accomplish its self-identified goals, to steer the group should it find itself beyond their

[162] I use "coach" as defined by the International Coaching Federation (ICF) standards: "partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential, which is particularly important in today's uncertain and complex environment." "FAQ," The International Coaching Federation, accessed January 15, 2022, www.coachingfederation.org/faq.

covenant to one another or the edges of what is within PC(USA) polity. A facilitator may serve a mentoring function as trust develops with the cohort as the participants desire, however mentoring is not the primary function of the facilitator. Ideally, facilitators are familiar with Keegan and Lahey's Deliberately Developmental Organizational framework (DDO™), which applies vertical development to organizational systems. [163]

What Does the Cohort Do?

Cohorts meet monthly, for about three hours per gathering. Three hours plus travel, invests time in the process, and justifies time in transit, without forfeiting an entire workday. If the geographic bounds of a presbytery are large enough that travel would take an entire day for participants, the cohort should consider a hybrid rhythm with some meetings in-person and some via video conference format on a rotation agreed upon by the cohort.[164] While the location can be flexible, it should be a place where all participants can feel relaxed and safe to honestly share what is happening in their lives and ministry. When gathered, cohorts participate in three of four primary activities: scripture reading and prayer, skill development, case studies, and fellowship.

God's word grounds each gathering as sacred space and sacred time. Beginning each gathering with scripture models turning to Christ as the one to whom we look to as

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[163]Robert Kegan, Lisa Laskow Lahey, et al. *An Everyone Culture: Becoming a Deliberately Developmental Organization*, (Boston: Harvard Business Review Press, 2016) or, Jennifer Garvey Berger, *Changing on the Job: Developing Leaders for a Complex World* (Stanford, CA: Stanford Business Books, 2012) are good starting points for cohort facilitators unfamiliar with vertical development and its intersection with organizational change and leadership. The limits of this project prevented me from diving into the connection between vertical development and organizational change more deeply here.

[164] Video meetings will likely work best when relationships are already solidified, and cohesive as per Marler's definition.

leaders. Cohorts may determine their own pace and sequence for this devotional time. They may choose to follow the lectionary, work through a book of the Bible, or follow a topical trajectory. Participants are encouraged to read a scripture passage and spend time dwelling in its meaning together, beyond curricula or professional commentary.[165] The goal is to read scripture together and to hear how the Spirit speaks through that word to them in that moment.

Prayer marks the transition from scripture reading to the remaining activities. Praying together as part of the cohort, and committing to pray for one another beyond the cohort's gathering deepens holy relationships and investment in cohort participants' lives. This foundation helps build that community of trust that permits cohesion. It also helps create the safety needed for reflection on heat experiences, particularly as part of case studies, when they arise.

After dwelling in scripture and prayer, cohorts will spend approximately seventy-five minutes on either case studies or skill development. Case studies are an opportunity for participants to share places in their ministry in which they desire deeper engagement and feedback. These may be challenges, stuck places, relationship dynamics, strategic planning, and more. On alternating months, two participants should be tasked with sharing their case studies with the group.

Case studies have documented success as a tool to help bridge gaps between theological reflection and praxis in ministry formation. New and emerging pastor

[165] The practice of "Dwelling in Word and Image" is a cornerstone spiritual practice for all leadership teams in the Presbytery of Dongeal introduced to us by Executive Presbyter Rev. Dr. Erin Cox-Holmes.

participants likely encountered case studies in Clinical Pastoral Education (CPE) or as part of a robust contextual education opportunity in seminary. This process should be somewhat familiar to most, yet cohort case studies offer a community of Presbyterian colleagues as reflection partners as well as a space free from the eyes of a supervisor conferring an evaluation at the end of a course or unit. They are particularly strong tools for vertical leadership development in ministry combining the three core elements, with an emphasis on reflection. In *Shared Wisdom: A Guide to Case Study Reflection in Ministry*, Mahan, Troxell, and Allen write:

> Ministry requires more than a refinement of skill. God's people make sense of life by connecting inner visions of God with actions in the world. Ministry is rooted in continuing self-reflection and theological focus, as well as in keen analysis of the context and needs of those with whom we minister. When inner and outer realities do not match, new or revised languages, images, and symbols are needed to make vital connections, to celebrate fresh meaning in life. Faith is challenged. In working through to new connections, faith can be deepened and strengthened. Case study is thus offered as a tool for deepening the interpretive skills that undergird faithful ministry.[166]

Case studies are opportunities for movement in vertical thinking and development because they often address heat experiences, those complex situations that force changes in thinking. These are often the initiating moments for transformation. They invite Mezirow's disorienting dilemmas. Ministry, particularly early career ministry encounters, offer an abundance of these disorienting dilemmas and heat experiences from which to draw. Peer reflection introduces different views, creating moments for those colliding

[166] Jeffrey H. Mahan, Barbara B. Troxell, and Carol J. Allen, *Shared Wisdom: A Guide to Case Study Reflection in Ministry* (Nashville, TN: Abington Press, 1993), 113.

perspectives. Space is left open for elevated sensemaking in these intentional opportunities for reflection. Petrie notes:

> The problem with most workplaces is not the lack of developmental opportunities, but that no one is learning anything from them. Begin by creating forums where people learn how to learn. It doesn't take anything fancy, just a process for asking each other questions about real work and real problems. We don't need to keep adding development; we just need to keep extracting it.[167]

Case studies offer a process to do just that—extract the learning already happening every day for new pastors in their ministry contexts.

The cohort format for case studies adapts the seven-fold structure for case studies as defined in *Shared Wisdom.*[168] As each case study will only have approximately thirty-five minutes for presentation and discussion I have simplified the structure from seven steps to four, collapsing Mahan, Troxell and Allen's categories of sharing personal wisdom, claiming the wisdom of the people of God, and reflecting on the presenters ministry into one step. The cohort case study steps are as follows: share the case, ask questions for clarification, offer wisdom and reflection, and share learnings and action steps. Facilitators are responsible for keeping the case study moving through the steps within the time frame allotted. Case studies begin with the presenter distributing and reading through the case study. Cohort participants are then invited to ask questions to clarify the case study. It is important that questions are immediately relevant to the specific challenge. Ancillary information can be interesting and often endless, though

[167] Nick Petrie, "The How To of Vertical Leadership Development – Part 2," 14.

[168] Mahan, Troxell, and Allen, *Shared Wisdom,* 28.

unimportant in helping the cohort support the presenting pastor. Together, steps one and two ideally take no more than ten minutes.

The core of case study time is spent reflecting together, offering wisdom and feedback to the presenter. This wisdom is drawn from the well of knowledge among the group from both personal experience, educational knowledge, and theological perspective. The facilitator helps the cohort respond to the case study not with their own answers or suggestions, but with insight and wonderings that help the presenter reflect on their challenge in a new way. Case studies draw from the diverse wisdom of the group and further develop trust within the group dynamic. Case studies conclude with the presenter sharing what they are taking away from the process and any action steps that have come from it. When done well, the presenter is able to claim new insight and perspective to take back to their ministry context. The leap to vertical development happens when that new insight begins to expand their worldview over time.[169] The complete process for the presbytery peer-learning cohort cases studies can be found in Appendix 1.

Case studies intentionally structured for vertical development and theological reflection help create the type of holy learning environments Jesus fostered for the disciples. Mahan, Troxell and Allen continue, "…case study contributes to enhancing discipleship. It takes place in small groups of persons who work together to form learning communities in which knowledge arises out of dialogue. Information is not simply

[169] Petrie, "The How To of Vertical Leadership Development – Part 2," 17.

transmitted by experts to novices. Room is made for diversity and disagreement."[170] Case studies participants move beyond simply skill building to opportunities where one can grow holistically as a leader, shaping spiritual and vocational identity.

On months opposite case studies, cohorts will participate in skill development in areas cooperatively identified by group members. Horizontal development must not be forgotten by organizations emphasizing vertical development. Petrie writes:

> We need leaders who recognize that their greatest growth happens not just in the classroom, but on real, complex work (with the right supports in place.) Most of all, we need practitioners who can take the best of what they know about horizontal development (building skills and competencies) and combine it with the best approaches for developing leaders vertically.[171]

Twice per year, at the beginning and mid-year of a cohort's cycle, the group self-generates its learning goals. The facilitator helps the participants name the skills that they want to develop based on what is needed most in their current ministry context. This feature addresses missing horizontal development from the Preparation for Ministry Process, understanding that with the rapid speed of change there are always new skills to develop in ministry. These topics are generated by the cohort, whether they be leading stewardship campaigns, learning better preaching techniques for live-streamed worship, exploring a leadership theory, staff development, or anything else even loosely connected to ministry that is life-giving for the group. The facilitator works to identify those people

[170] Mahan, Troxell, and Allen, *Shared Wisdom,* 14.

[171] Petrie, "The How To of Vertical Leadership Development – Part 2," 22.

and opportunities that can help the cohort accomplish its learning goals. Where applicable, it is helpful when one person in the cohort is an expert in one of those new-skill areas and shares that expertise with the cohort. Learning pedagogy constantly emphasizes the additional growth that occurs when a learner becomes a teacher.[172] Shared learning experiences, especially those that can offer heat experiences or colliding perspectives followed by group reflection are encouraged. Guest experts may also be invited to help teach the identified skills. At the end of each year, the group evaluates the progress of the cohort using a process of collaborative inquiry. Collaborative inquiry is a process used in professional education, most often used with educators, where groups form to reflect on their process for learning and its effectiveness, and then improve on it. Rather than measure the group's impact in a static moment with a metaphorical bar that is either achieved or missed, collaborative inquiry calls the group to a cycle of self-evaluation, naming success in whatever form it takes, and turning failures into growing areas that are then enacted. "Evaluation as collaborative inquiry helps us understand whether what we are doing is what we intended it to do and determine what we can do to improve it."[173] It emphasizes continual growth and invites what might be perceived as failure as an opportunity to grow. "In evaluation as collaborative inquiry, there is no such thing as 'failure.'"[174] Vertical leaders who process failure as necessary learning rather

[172] Jessica Lander. "Students as Teachers." *Usable Knowledge: Harvard Graduate School of Education* (blog), December 20, 2016, https://www.gse.harvard.edu/uk/blog/students-teachers.

[173] Marler, *So Much Better*, 165.

[174] Marler, *So Much Better*, 168.

than an evaluation of success as a leader, are more ready and willing to take risks that help their organizations thrive in VUCA contexts.

The fourth component of cohort gatherings is fellowship and a meal. Some of Jesus' most transformational moments happened around table, sharing food with his disciples. Whether serving as in the feeding narratives, or being served in the Upper Room, Christ nurtured and taught the disciples around a meal. As a church, we believe that when we gather together, Christ is known among us in the breaking of the bread. Trust and vulnerability are fostered around core Christian practices.[175] The conversations that occur around meals further deepen the relationships between cohort members. This creates an opportunity to get to know one another well and normalizes the experiences pastors share in their ministries which otherwise can be isolating. Fellowship in this way helps contribute to that sense of commission, where what is learned is integrated into the pastor's life, identity, and purpose. "A peer group helps a pastoral leader remember his or her calling as an invitation to a divine partnership and renew it through covenant relationship with fellow disciples. It is a corporate mission, a co-mission."[176] The bonds forged through the fellowship within cohorts can create lasting relationships and health models of self-care to sustain ministry well beyond the first five years of ordination.

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[175] Hannah Elise Jones, "Developing Effective Leadership: Exploring the State of Vertical Development in Practice" (Master's Thesis, Pepperdine University, 2018), 48, Proquest Dissertations & Theses Global 10838070.

[176] Marler, *So Much Better*, 15.

Cranton uses the following characteristics to characterize adult learning: the voluntary and collaborative nature of adult learning, adults' preference for self-direction, the importance of meeting practical needs, the role of adults' experiences in their learning, the relevance of self-concept, and the emphasis on learning styles.[177] This presbytery-based peer cohort model incorporates these criteria as it invites emerging and new pastors into a collaborative learning process, rather than mandates it. There is significant self-direction as the group determines its own curriculum and each participant offers case studies relevant to their ministry in real time. The cohort's various activities incorporate different learnings styles. The model leans towards Divergers ("those who enjoy generating ideas and working with others") and Accommodators ("those who learn from experience and engage in trial and error learning"), though skill development can encompass almost any learning style.[178,179] Self-concept describes adult learners as having responsibility for their lives and learning, and this cohort model gives ample agency to the participants. By participating in cohorts that foster vertical development blended with intentional emphasis on aspects adult transformative learning, pastors learn not just basic movements to dance in ministry, but how to strengthen their capacity to

[177] Cranton, *Understanding and Promoting,* 14.

[178] Cranton, *Understanding and Promoting,* 5. Here Cranton uses Kolb's four learning styles defined as "a preference for a certain condition or way of learning and is generally considered to be value neutral." The two not identified in the text above are Convergers, "who prefer to arrive quickly at specific, concrete solutions," and Assimilators, "who like to integrate ideas into models and theories."

[179] Recent research in education has noted an over-emphasis on teaching to one's preferred learning style and now encourages various style be incorporated for all learners for the greatest chance for learning to stick. See, "Different Learning Styles—What Teachers Need to Know," *The University of Kansas School of Education and Human Sciences* (blog), June 28, 2021, https://educationonline.ku.edu/community/learning-styles-what-teachers-need-to-know.

fluidly move with the gifts the Spirit has given them for wherever God calls. This early ministry cohort models that pastors are the agents of their own learning. Growing and thriving in ministry is supported by prioritizing opportunities for continued learning and health in their vocation, encouraging seeking out resources and colleagues as partners for their ministry journey beyond these first years.

Evaluation

Presbytery-based Emerging and New Pastor Peer-Learning Cohorts seek to support clergy thriving as they begin ordained calls. These groups were developed to address the absence of vertical leadership development as part of the ministry preparation, as well as to bridge gaps in the preparation process that seem to make the transition into ordained ministry so challenging in a 21st century landscape.

How will we know if these cohorts are succeeding in fostering opportunities for vertical development among participants? As far as I could glean from my research, vertical development is not an approach that has been used before in studies specific to clergy, but it has been measured and studied in business leaders throughout the United States and Europe. There are standardized instruments that measure vertical development, such as Rooke and Tolbert's Leadership Development Framework (LDF).[180] The various instruments and methods are specific to the different theories and researchers that have worked in the vertical development and adult cognitive development fields. However,

[180] For more information on the Leadership Development Framework (LDF), see "Leadership Development Framework," Harthill Consulting, accessed January 20, 2022, https://www.harthill.co.uk/leadership-development-framework.

these instruments are designed to be used with corporate leaders and executives with different access to resources than most presbyteries and pastors, most notably financial resources. These instruments and their interpretation become prohibitively expensive for our purposes.[181] Most leaders employing vertical development into presbyteries will have to rely on other observable evidence to know if their efforts are making an impact.

Vertical development intends to help leaders expand their cognitive skills to be able to hold complexity, ambiguity, and uncertainty. It seeks to foster more creative, resilient, and open-minded leaders. Facilitators should develop their own evaluative survey tools for pastors that incorporate these intended growth areas into the instrument. A sample survey is provided in Appendix Two. The survey could include questions around their leadership strengths and growing areas in ministry, knowledge they did not learn in seminary they wish they had, and what capacities they hope to develop for their ministry now. Questions on clergy well-being and satisfaction should also be included as these tend to be markers that correlate with thriving and retention in ministry. An initial survey should be taken near when the cohort completes its learning goals for the year. The survey should then be retaken at the end of the year, and include an opportunity for feedback on what was gleaned from the cohort over the year. This entry and exit survey should be given at the start and end of each cohort year. Over time facilitators can compare those surveys to see if the cohort participants self-identify growth and whether clergy well-being and satisfaction stays the same or improves.

[181] A comprehensive list of vertical stage assessment tools is found in Petrie, "The How To of Vertical Leadership Development – Part 2," 7.

Other observable markers will also indicate to a presbytery if the cohorts are engaging participants and encouraging their development. Over a period of five to seven years, facilitators and presbytery leaders will be able to see if those who fully engage with the cohort year after year have a higher ministry retention rate than those who opt out. Those cohort statistics can also be compared to the national average as the denomination releases periodic studies on clergy retention, satisfaction and well-being.

One other piece of feedback that may be useful under certain circumstances is feedback from congregations regarding their thriving and their relationship with the pastor. A congregation's well-being can be an indication of development for those who participate in the cohort as healthy leadership is modeled for lay leaders in the church. A caveat to this feedback is that sometimes congregations may not see their pastor's development as positive for the church; especially if the pastor's new ways of leading challenge the old paradigms of being church encapsulated in Chapter 1 as the church shifts from the Age of Association to a new vision for this new millennia. Pastors who seek feedback on their own vertical development from cohort participation should only give the evaluation to a small, trusted group of congregational leaders. These may include people on a personnel team, advisory council, or other group that has demonstrated a commitment to see the pastor succeed and thrive in the congregation. Significant disparity between what the pastor sees as growth and any congregational feedback should be handled carefully by the facilitator, as it may indicate other challenges between the pastor and congregation. With the permission of the pastor to not breach confidentiality, those moments may be a warning sign to pass on to the Committee on Ministry (COM) or

Executive Presbyter for additional support. A sample template for a church leaders survey to be given at the beginning and year-end of the cohort is located in Appendix 3.

As congregations in the PC(USA) continue to adapt to the contours of a rapidly changing, 21st century church without the institutional strength of generations past, the PC(USA) must adapt their Preparation for Ministry Process to fully equip emerging and new pastors for the essential work of sharing the Gospel and leading the church in this new era. Margaret Wheatley writes:

> In order to counter the negative organizational dynamics stimulated by stress and uncertainty, we must give full attention to the quality of our relationships. Nothing else works, no new tools or technical applications, no redesigned organizational chart. *The solution is each other.* If we can rely on one another we can cope with almost anything. Without each other, we retreat into fear.[182]

Presbytery-based peer learning cohorts strengthen clergy relationships while offering ways to bridge the gap between knowledge and assessment-based preparation. They foster a more balanced horizontal and vertical vocational formation that equips pastors with the thinking capacities and resources to more fully live into their ordination vows as they serve the church with energy, intelligence, imagination, and love.

[182] Margaret J. Wheatley, *Finding Our Way: Leadership for an Uncertain Time* (Oakland, CA: Berrett-Koehler Publishers, 2007), 118.

Conclusion

Possibilities and Hope

December 23, 2021. My co-pastor and I received a text message from our music director informing us that we'd be down another couple in the choir for Christmas Eve services. We added them to the long list of volunteers who came down with or had been exposed to the Omicron variant of Covid-19, which was hijacking yet another church celebration from any sense of normalcy. Cases skyrocketed the week before Christmas in our community. My colleague and I stared at each other for a moment, reading each other's eyes, the only part of our faces visible behind our masks which said "get ready to pivot and adapt again." And adapt we did.

My first Christmas with that new congregation certainly was not what we had expected. A church that pre-pandemic worshipped over one thousand people on Christmas Eve saw only three hundred across five services that evening. I wrestled with the conflicted emotions of that night. I felt sadness for all whom we did not celebrate with, yet relief that most of the church members did not risk their health. I experienced gratitude that so few people provided a sanctuary with enough space to social distance those who did come, yet concern that those who had missed their fourth major holiday would never return. At the same time, I experienced joy that our staff did their best in imperfect circumstances, and hope in a God who entered the world with the humility and vulnerability of a baby in an animal's feeding trough. I do not think I will ever get used to celebrating The Lord's Supper breaking the bread while speaking into the camera. I do not like it, but I am thankful for the technology that unites the church across time and

space in the sacred and familiar acts that remind us Who and Whose we are when we need it most. This is the reality of ministry in the 21st century U.S. mainline Protestant church in a volatile, uncertain, complex, and ambiguous world. It is not the work for which PC(USA) pastors are trained. But it is the work, the community, to which God still calls us.

In this project I offer that the PC(USA) Preparation for Ministry Process can benefit from adding vertical leadership development to its robust clergy formation in response to the unique challenges of leading congregations today. The PC(USA)'s Preparation for Ministry Process, which equips pastoral candidates for ordained ministry, is a critical formative component of a Presbyterian pastor's call to ministry and vocational formation. The process shapes every pastor that serves a congregation in the denomination. Overseen by regional presbyteries, this process tries to ensure that pastors entering congregations are equipped with the education, skills, spiritual, and leadership development to serve God faithfully and the church well.

The challenge is that the formal PC(USA) process is an extremely complex dance to navigate across multiple entities, all of whom need to update their own formation goals to meet the realities and demands placed on pastors leading 21st century congregations. The national PC(USA) General Assembly, seminaries and theological schools, and local presbyteries all play unique and important roles. However, getting each key player together to improve ordination formation and expectations for pastors seems impossible until those entities do the introspective work grappling with change in their own organization first. I argue that to leave the gap open while waiting for that overarching

conversation is detrimental to the wellbeing of pastors and the health of congregations. Presbytery-based, self-directed peer-learning cohorts that create space for vertical development alongside the horizontal knowledge and skills already emphasized in the Preparation for Ministry process can bridge the gap. These cohorts can teach new skills to keep up with the movement of the Spirit as she dances into the future.

To support this claim, this project began by looking at the history of Presbyterian clergy formation in the United States and how the PC(USA) Preparation for Ministry process came to be what it is today. It is a process developed and honed in the height of what Smith identifies as the Age of Association, the hallmark of institutional thriving. It developed for a time when to train as a pastor was to learn as a professional—where carefully honed knowledge and expertise supported a new pastor entering ordained ministry and with that standardized knowledge and a love of Christ could lay the foundation for a lifetime vocation. While that was not everything a new pastor needed to thrive, it was enough to get started. I am grateful for the PC(USA)'s rigorous academic focus as a foundation for ministry, and for the skills that are shared today. These are important components of ministry and the church would suffer without them. But alone, they are not enough to fully equip today's emerging and new pastors for what they will encounter in congregations at ordination. The landscape of ministry in the United States in the Age of Authenticity calls for pastors who have been formed with the horizontal skill sets that can be passed on with knowledge, but also with the vertical leadership and critical consciousness development that permits people to lead in the challenging and uncertain times we navigate now. It calls for pastors who are equipped to lead a church

through pandemic, political polarization, institutional decline, cultural shift, through whatever the next challenge is that is thrown our way. The new reality is that there will always be the next change right on the horizon. Knowledge and skills are only as helpful as the speed at which we can learn and teach them. Vertical development looks beyond skills and knowledge to shape pastors thought processes, consciousness, and ability to hold complexity to lead differently and more effectively.

Adaptive leadership, vertical and horizontal development, and the psychology that undergirds them offer practical new lenses through which to imagine pastoral formation. They hold in tension the realities of leading in times of chaos and change with the social science of human development leveraging what we know about how people learn and grow. Rooting my work is the scholarship of Heifetz, Petrie, Cook-Greuter, Torbert and Rooke, and Kegan and Lahey, I offer that while vertical leadership theory has been used primarily in business and organizational psychology there is much that it can offer clergy as leaders. The three core components that foster vertical development—heat experiences, colliding perspectives, and elevating sense making—are natural parts of emerging and new clergy's daily ministry where almost every day brings the opportunity for new learning under stressful circumstances and an introduction to diverse people, values, and experiences. Presbyteries can work to ensure that final component—reflection—occurs in ways that maximize the experience and awareness that creates leaders who are more resilient, open-minded, creative, and adaptive. The goal of emphasizing vertical development is not to push all pastors into the highest stages of

consciousness, but to bring out each pastor's best qualities as a leader in their present stage of development and create opportunities to cross into the next level when ready.

While vertical development may be a new idea to the contemporary church, one can turn to Scripture and see a foundation for such development present in our earliest examples of discipleship formation. The Gospel of Mark describes how the components of vertical development are present in Jesus' relationship with the disciples using the Feeding Narratives of Mark 6 and Mark 8 as case studies. Jesus' commitment to strengthen the leadership of the Twelve, in all their imperfect leadership and inability to grasp what Jesus tries to teach them the first, second, or fifth time, gives hope to pastors who wonder why God has called us to lead the church in this unique time. Mark's gospel is God's invitation for the church to think differently about leadership formation as we write the next chapter in the Christian story.

This project clearly asserts that vertical development cannot be separated from clergy formation. As pastors who lead through our preaching, our teaching, our moderating boards, and more, we must harness our capacity to lead well in the extremely complex and stressful times through which we are living. The statistics of clergy burn out are staggering—especially with clergy newer to ministry. Presbyteries have a responsibility to those on whom they confirm ordination and the congregation to which they are called to support them in this leadership development. The current Committee on Preparation for Ministry process simply is not designed to do that. And that is fine, as long as the leadership development occurs some other way. I believe presbytery-based self-directed peer learning cohorts can bridge that gap. In the final chapter I define the

contours of these small group cohorts with a presbytery-appointed facilitator. These groups meet monthly for collegial support and formation around key components; scripture reading and prayer, sharing case studies from their contexts, learner-identified skill development, and fellowship with a meal. Together, I believe these components create fertile ground for vertical development to occur. I ground the theory behind these cohorts in adult learning theory by Mezirow, Cranton, and Lahey among others, research on clergy peer cohorts by Marler, and a case study model for ministry by Mahan, Troxell, and Allen. These cohorts can provide a bridge across the gap in the Preparation for Ministry process that creates a difficult transition from theological education to ordination. They can teach emerging and new pastors a new dance step for this new day.

Addressing Cohort Implementation Concerns

As I spoke with colleagues across the denomination about my research and the contours of this project, I heard affirmation that Preparation for Ministry was an area that needed considerable support as the church adapted for the realities in front of us. While few had heard of vertical development, once I explained the theory no one challenged that vertical development was underemphasized in the Preparation for Ministry process, and several thought that if it could be implemented, it would be a healthy addition. Simultaneously, I watched colleagues lament that the skills they were learning (or had learned) for ministry were not helping them lead at this critical moment in American history. About a year into the pandemic, a candidate serving as a student pastor to a small, rural congregation told me the last thing that seemed relevant to him and to his congregation was his second required Hebrew class in the face of the complex pastoral

situations of the day. As we shared lunch outside with other colleagues that afternoon, the new and experienced pastors both nodded in his direction, signaling their solidarity. The collegiality of fellow pastors in the presbytery sharing their wisdom, tories, and support around the table made a difference to that student pastor.

Over these conversations about the project, the concerns that were raised centered mostly on feasibility and resources and came from leaders working in higher judicatories. One national church consultant told me that presbyters already did not have enough time to do all that was needed in their presbyteries, and I should be careful about adding anything else to their plate.

It is true that presbyteries across the country are by-in-large understaffed and under resourced. As the denomination loses members, shared proportional giving (also known as per capita) decreases with it, which is the primary funding source for most presbyteries. There are multiple presbyteries in the PC(USA) currently without an executive leader, leaving most of the responsibilities to fall to the Stated Clerk. Without enough leadership to keep their systems running smoothly for the congregations they have within their bounds, it us understandably difficult to imagine placing a presbytery's priorities on preparation for ministry and those in their first years of ministry. Yet, if resources are not allotted to reshape pastoral formation in some way, the challenges for presbyteries will only become greater. Pastors will struggle in congregations without the capacities they need to lead and share the Gospel in ways relevant and responsive to today's realities. It will take more energy and resources to care for pastors experiencing burn out and the impact that has on their congregations. Pastors who are gifted and called

will leave congregational ministry, reducing the pool of pastors to send into pulpits. Congregations without leaders trained with the capacities to thrive in today's religious landscape will struggle to live into the future with relevance and purpose. Eventually, floundering congregations become the presbytery's problem to support or close.

These cohorts were designed to use minimal presbytery resources while maximizing impact. The only human resources the presbytery needs to provide on a regular basis is the facilitator, which does not have to be presbytery staff, and someone to coordinate advertisement for the group with instructions for how to join. These cohorts also benefit presbytery CPMs and COM as an intentional connection point between emerging and new pastors and the presbytery. While the facilitator will be bound by the same confidentiality of the group covenant, a natural sense of belonging may emerge between the cohort members and the presbytery in these models, easing the burden of creating a connection in other ways. Financially, these cohorts can function with as little or as much resourcing as the presbytery can provide. A presbytery is encouraged to compensate the facilitator, to pay for meals for the cohort, to invest in the resources for accomplishing learning goals, and to offer participation incentives, but none are required for the cohort to meaningfully exist if participants are committed to the program's success. This minimal investment is worth the cost, understanding the great potential for impact and the devastating realities if nothing is done.

Concerns were raised in the process of this research about the limitations of denomination-specific cohorts. Some wondered if candidates and pastors can truly be honest and vulnerable in a space where colleagues are so closely intertwined

professionally. Marler addresses this in her research noting the benefits on cross-denominational cohorts:

> Groups composed of members from different denominations, whether appointed or self-selected, provide greater anonymity, and so, safety, for frank conversation. Groups made up of persons from the same denomination, especially if they are assigned rather than self-selected, may have more difficulty moving beyond posturing to transparency.[183]

I do not challenge the benefits of cohorts with cross-denominational members. However, for the purposes of bridging gaps in the Preparation for Ministry Process, it is important that these cohorts be lodged within the presbytery, and limited to Presbyterian participants. In the PC(USA)'s system of government and our theology of call, the presbytery plays a critical role in the development of a pastor's early vocational identity. Given the high expectations of investment between the candidate and CPM in the preparation process, with its many hoops emerging pastors must jump through to be considered by the CPM for ordination, the presbytery should be as equally invested in the health and well-being of this new pastor as they enter congregations. Presbyterian polity is also a unique system that takes time to learn. Not all candidates graduate from PC(USA) affiliated seminaries nor come from Presbyterian backgrounds as part of their upbringing. An all-Presbyterian cohort with a Presbyterian facilitator can help emerging and new pastors understand how the polity of our church plays out in congregational systems. Emerging and new pastors should not be limited to receive support only from Presbyterians and they should be encouraged to seek out that diversity in experience and

[183] Marler, *So Much Better*, 16.

relationship beyond this cohort. However, a denomination-specific space offers value in early ministry years and continual pastoral formation.

The limitations of vertical development theory also surfaced as a concern. No theory is perfect. A critique of vertical development, as of other linear stage theories, is how the complexity of people's lives means they may fall back into a previous stage, or lead from a different level depending on the context and the people around them. This critique is valid. Petrie himself notes this stating:

> While most leaders are intrigued by the stages some worry about what stage they are at. I feel this is a problem we have created for ourselves… While leaders have a center of gravity they are most comfortable operating from, in the real world the best leaders operate from many different stages depending on the situation.[184]

Presbyteries implementing these cohorts must not overemphasize the stages themselves, but rather glean what the theory can offer for developing leader capacities and awareness. As I have not been able to find any studies of vertical development in connection with clergy formation, this would be an area for future study.

Hope for the Future

Throughout history God has led the church through constant change. Presbyterian leaders in the 21st century are not the first to wonder what the future of the church will be, nor the best way to equip pastors to lead them. The resilience of the Holy Spirit to adapt in whatever way the world needs to hear God's word gives me hope. No matter what our imperfect human visions for the church, God's dream will prevail. There will

[184] Nick Petrie, "Lessons in Vertical Leadership Development," Resources, Nick Petrie Future Trends in Leadership Development, 2020, 10, https://14226776-c20f-46a2-bcd6-85cefe57153f.filesusr.com/ugd/5b4220_541427b2d2be49b78e90499868dfd563.pdf?index=true.

always be those who work for love, justice, peace, and wholeness in a broken world until God's kingdom is made real on earth. There is a reason Mark leaves his Gospel unfished.

Gathering with colleagues in the NewLead cohort in the Presbytery of Donegal reminds me of this reality. I am grateful for the resilience, the vulnerability, the joy, the silliness, the camaraderie, the wisdom, and the faith that exists in that group. Throughout the pandemic, we have shared emails, Zoom calls, and text messages. We have checked in on one another, shared ideas, and commiserated about angry parishioners upset by the losses associated with change that direct that anger toward us. I even got a package filled with chocolate from cohort members when they noticed me looking uncharacteristically low on a check-in Zoom. This is the kind of group that helps keep pastors in ministry for the long haul. More than a support network, over the last seven years I have watched the members of this cohort move from being seminarians and new pastors in church calls to becoming truly gifted leaders—into Heads of Staff, to Presbytery Committee Chairs, General Assembly Leaders, Presbytery Moderator, and more. They are transforming their communities, leading conversations about racism and white privilege, working with refugees, feeding the hungry, addressing community wellbeing and mental health among teenagers. They are helping the church try new things and new ways of being, taking big risks, realizing some and failing some, and loving God's people in the midst of it. Ministry is by no means perfect here. For each one there have been mistakes, and there are days they wonder where the energy will come from to do it again tomorrow, but I have watched them get up the next day and do it again. This is the hope I see that can come from communities and cohorts that are intentionally oriented to foster vertical

development; to nurture future church leaders who dance with the joy of the Spirit, whatever the music, whatever the contours of the dance floor. These are the vertically formed and oriented pastors equipped lead as God reveals the PC(USA)'s next chapter.

Appendix I: Case Study Template

Case Study Template

Adapted from the case study model in: Jeffrey H. Mahan, Barbara B. Troxell, and Carol J. Allen, *Shared Wisdom: A Guide to Case Study Reflection in Ministry* (Nashville: Abington Press, 1993

Before Gathering

Select two presenters to prepare case studies to bring to the cohort gathering. Case studies are to be written down and no more than two pages single-spaced, drawn from a current ministry challenge.

The text of the case study should include: background and context, a description of the event, synopsis of what you think are the key challenges at stake, what you have done so far, your own theological reflection on the challenge—where is God in this story? [1]

Case study presenters should bring to the gathering enough case study copies for each cohort participant.

During the Gathering

1) Present the Case Study (5 minutes)
    a. Distribute the case study to cohort
    b. Presenter reads the case study out loud
2) Ask questions for clarification (5 minutes)
    a. Cohort members are invited to ask questions for clarification on the case as presented.
        i. Questions should be focused on relevant information to support the presenter's learning
3) Offer wisdom and reflections (20 minutes)
    a. Participants draw from their experience to ask questions that might provoke new insight into the case for the presenter drawing from
        i. Their life experience
        ii. Their education
        iii. Their own ministry context
        iv. Scripture and Theology
    b. Participants should be careful to frame their wisdom and refection as wondering questions and their own perspectives. They should not tell the participant what to do or think.
4) Share learning and action steps (5 minutes)
    a. Presenter shares their learnings gleaned from the cohort during the case study
    b. Presenter verbalizes any action steps they might take related to the case study
    c. Participants name any learnings they have cleaned from reflecting on this case study
5) Close in prayer for the presenter and the situation.

[1] Mahan, Troxell, and Allen, 34

Appendix II: Sample Evaluation Tools

Cohort Participant New Year Survey

Cohort Participant New Year Survey

Please fill out this survey answering as honestly as possible. Try not to overthink your responses—there are no right or wrong answers. All responses will be kept confidential. If you would like to talk with the facilitator about your responses, please indicate that on the survey before returning it.

1. As I enter ministry this year I feel:

2. I see God's presence in my ministry setting when:

3. My leadership strengths in my ministry setting are:

4. My growing areas in leadership are:

5. The current challenges I face in my ministry are:

6. The skills I need to learn most for my ministry context this year are:

7. I hope my time in this cohort offers:

8. I think thriving in ministry looks like:

Indicate below how close to that vision of thriving are you currently?

Struggling ⟷ Thriving

Cohort Participant Year End Survey[185]

Cohort Participant Year End Survey

Please fill out this survey answering as honestly as possible. Try not to overthink your responses—there are no right or wrong answers. All responses will be kept confidential. If you would like to talk with the facilitator about your responses, please indicate that on the survey before returning it.

1. As I reflect on ministry this year I feel:

2. The areas I grew leadership this year are:

3. The current challenges I face in my ministry are:

4. The skills I learned this year are:

5. My time in this cohort offered:

6. This year I…[1]

Had experiences that stretched me

Not at all — Somewhat — Tremendously

Noticed I developed new ways of thinking

Not at all — Somewhat — Tremendously

Strengthened my collegial network

Not at all — Somewhat — Tremendously

7. I think thriving in ministry looks like:

Indicate below how close to that vision of thriving are you currently?

Struggling  Thriving

[185] Question 6 references Nick Petrie's three identified levers for developing vertical leaders. Nick Petrie, "Vertical Leadership Development—Part 1: Developing Leaders for a Complex World," The Center for Creative Leadership, 2014, 12, accessed August 5, 2020, https://www.ccl.org/wp-content/uploads/2015/04/verticaleaderspart1.pdf.

Congregational Leader Year End Survey

Congregational Leader Year End Survey

This year your pastor participated as part of a clergy peer-learning cohort emphasizing leadership development for those entering and newer to ministry. Your responses will help reflect the ways he/she/they have increased their leadership capacities this year and encourage ongoing development. Your survey will be shared directly with your pastor. Please note this is not a performance evaluation, rather a tool to assess growth and thriving under the current congregational climate.
Thank you for supporting your pastor in ministry!

1. Ministry in our congregation this year felt:

2. Our pastor's leadership shined this year when:

3. This year I saw our pastor's leadership capacities expand by:

4. This year I saw my pastor's thinking shift when:

5. Our pastor was challenged by:

6. Our pastor had connections with other colleagues in ministry this year:

7. Our congregation's relationship with our pastor is:

8. The current challenges our congregation faces are:

9. I think our congregation's thriving in ministry looks like:

Indicate below how close to that vision of thriving your church is currently?

Struggling ⟷ Thriving

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