

# TRCI 2.0 Dashboard Evaluation Report

June 2014 - December 2015

CAPD For TRCI and the Duke Endowment



# Introduction to this Dashboard

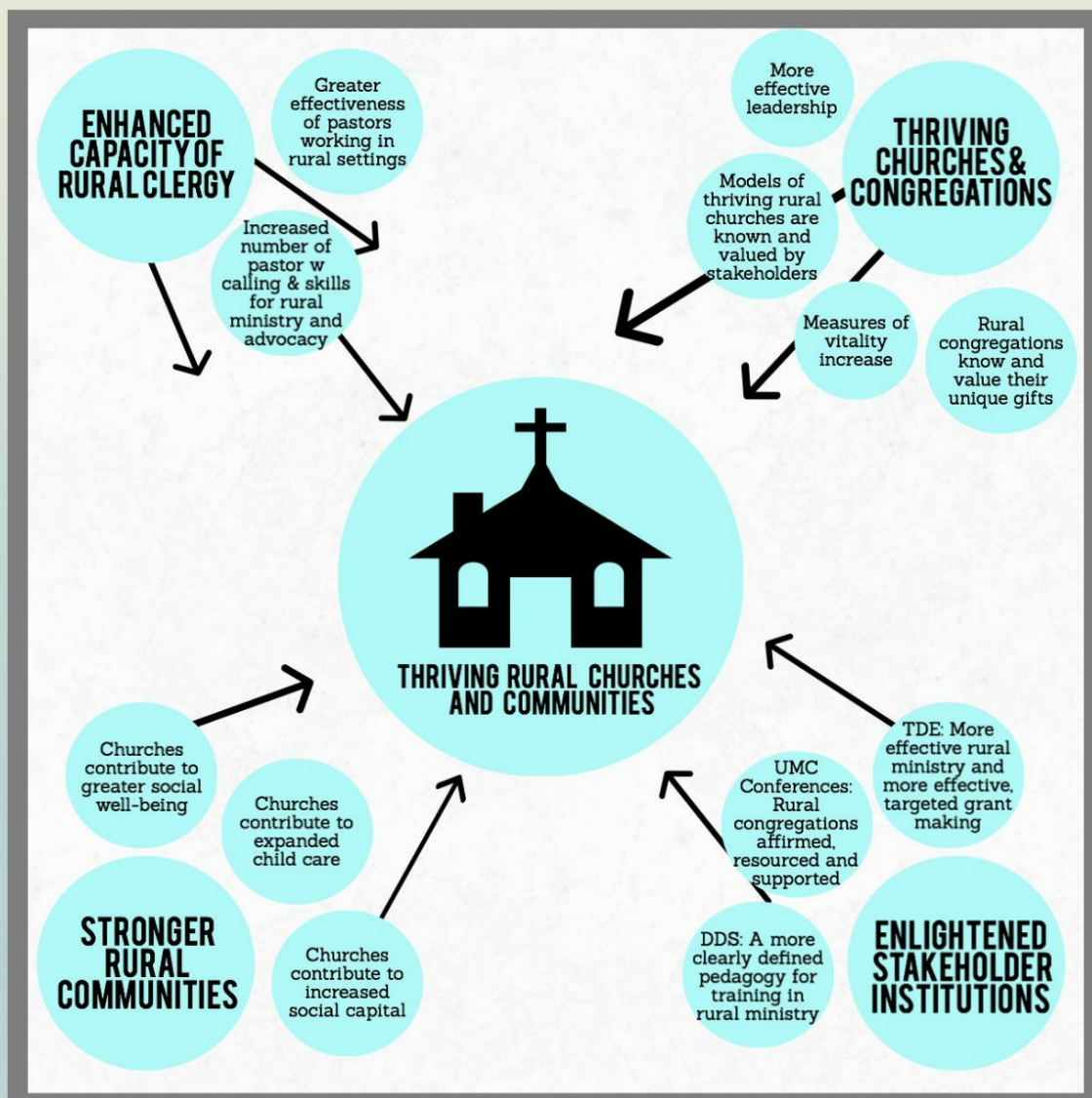
CAPD is pleased to submit this interim Dashboard report of the Thriving Rural Communities Initiative (TRCI).

A summative evaluation report of TRCI's first phase was produced in 2014, covering start-up, strategy implementation and early results for the period 2006/7 to 2013/14. This Dashboard focuses on what TRCI has accomplished against the goals it has set for itself, looking primarily at early and mid-point indicators and markers of progress. In doing so, the Dashboard provides insights about some of the issues raised in the earlier report, as well as some new ones.

The Dashboard is intended for an internal audience, pending review by the TRCI Director and representatives from its stakeholder institutions: the Duke Divinity School (DDS), which oversees TRCI and where the program office resides, the North Carolina Conference of the United Methodist Church (NCCUMC), the Western North Carolina Conference of the United Methodist Church (WNCCUMC) and the Duke Endowment (TDE).

Sally Leiderman and Stephanie Leiderman  
Center for Assessment and Policy Development  
January 2016

## Thriving Rural Communities Initiative Theory of Change





# Summary of Findings

## Enhanced Capacity of Rural Clergy (Pages 5 to 7)

### Major Findings at Interim

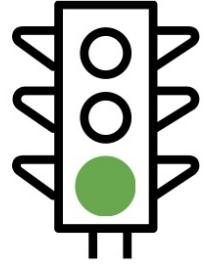
TRCI continues to contribute to building a critical mass of well-trained rural clergy. They are aware of the challenges facing United Methodism and individual rural churches, and are beginning to offer thoughtful ideas for change.

We found few differences between graduated and appointed Fellows who were traditional students and those who were student pastors on perceptions of readiness. The key difference - not surprising - is that traditional students feel prepared for their first appointments through a combination of TRCI activities and Field Ed, and student pastors feel prepared through a combination of TRCI activities and "on-the-job training."

### Potential Issues

Many Fellows feel called and formed to engage beyond the church walls. Many would appreciate more training and support for that work.

Fellows remain homogeneous as a group (90% are white; 73% are male).



## Thriving Rural Churches and Congregations (Pages 8 to 10)

### Major Findings at Interim

Rural Fellows are stepping up into leadership as clergy and in their communities around the church. Two TRC Partner Churches are now led by Rural Fellows. The Director of the Hispanic House of Studies is a Rural Fellow. At least three churches transitioned from a student pastor position to a full-time pastor position - based in part on the leadership the church laity saw in a Rural Fellow, originally their student pastor. Several Fellows are helping their communities navigate serious environmental concerns.

In terms of the effectiveness of Fellows' leadership, in growth or thriving measures, it is still too early to know. We can say that about two-thirds of Fellows say they have found themselves taking on at least one particular issue in the community outside their church, and 70% note their church has started at least one new hands-on local mission during their tenure.

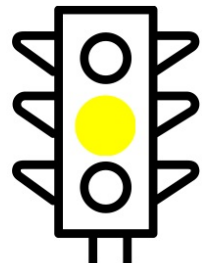
The evidence to date also suggest that Rural Fellows are equipped and inspired to grow their churches and address pressing local issues. Many feel called and equipped to try to open up their congregations to new people, work outside the church and to try to respond to serious congregant needs (mental health, substance abuse, and/or economic issues among parishioners). Many Fellows report not knowing exactly how to effectively lead a resistant or cautious congregation towards those particular goals.

In terms of the extent to which rural churches and congregations feel valued, evidence is mixed. The TRCI Director has done a number of things to increase awareness of the initiative among laity in churches served by Rural Fellows, and to connect with the TRCI 2.0 partner churches. When that connection is made, laity do feel valued by the investment they feel the stakeholder institutions are making in leadership for rural churches. At the same time, some Rural Fellows and laity feel "unimportant" based on what they see as lack of resources and isolation which they attribute to being in small rural churches.

### Potential Issues

Rural Fellows would like more training and access to resources for handling the most serious congregant needs and for managing change effectively.

While the stakeholders want and expect Rural Fellows to exert bold leadership, the Rural Fellows don't always feel supported by their denominational leaders when their congregations resist that leadership.



# Summary of Findings (cont.)

## Stronger Rural Communities (Pages 11 to 12)

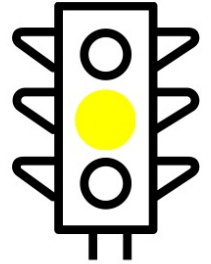
### Major Findings at Interim

Most Rural Fellows have started new local hands-on missions at their current charge, many of which are funded through TDE and/or TRCI.

Fellows note a range of benefits for their churches from local hands-on mission work, particularly new connections with people of different perspectives, deepening the church spiritually, new partnerships and stronger church leadership.

### Potential Issues

Only a few Fellows believe their churches' local hands-on mission work is solving a community issue or problem or has brought new resources that have been sustained.



## Enlightened Stakeholder Institutions (Pages 13 to 15)

### Major Findings at Interim

After a period of leadership transitions and lessened engagement, the partners have begun to meet again to discuss key issues, including the Rural Fellow pipeline, inclusion, the partnership itself, and training for lay leadership around issues of thriving.

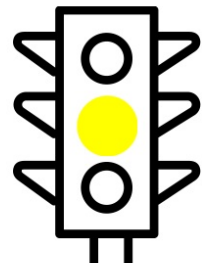
There is some traction on the Rural Fellow pipeline – the TRCI Director has a number of high quality candidates for next year's incoming class, in part through recommendations and support from the the Admissions Department of the Duke Divinity School and from the two North Carolina Conferences (particularly from District Supervisors and from Ministerial Relations).

The stakeholder institution partners are also in early stages of working together on issues of inclusion.

### Potential Issues

Some Fellows are having difficulty getting through the ordination process in a timely manner – some are being deferred and some are self-delaying – and some Fellows are being appointed to unhealthy churches, issues of concern to all of the partners.

So far as we know, the stakeholders have not yet developed a sustainability plan for TRCI should that be something they want or need.





# Methodology

## New data sources for this dashboard include:

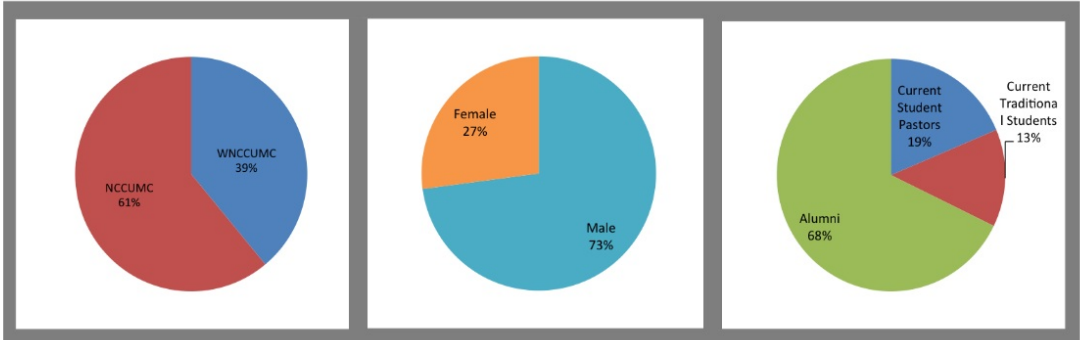
- Interviews with current student Rural Fellows in February 2015. We interviewed five student pastors and five traditional students.
- A site visit to each of the eight TRCI 2.0 Partner Churches, including an in-depth interview with the pastor and a separate meeting with a group of laity at each church.
- Site visits to other churches served by TRCI alumni, including interviews with laity at five churches served by TRCI alumni and three with laity at student pastors' churches, as well as six interviews with TRCI Alumni currently serving as pastors.
- Interviews with members of the Boards of Ordained Ministry from both North Carolina Conferences.
- Participation and observation of the May 2015 TRC Advisory meeting.
- Reports from the program and monthly calls, and ongoing discussions with TRCI Director and Staff.

## We also surveyed all Rural Fellows in 2015

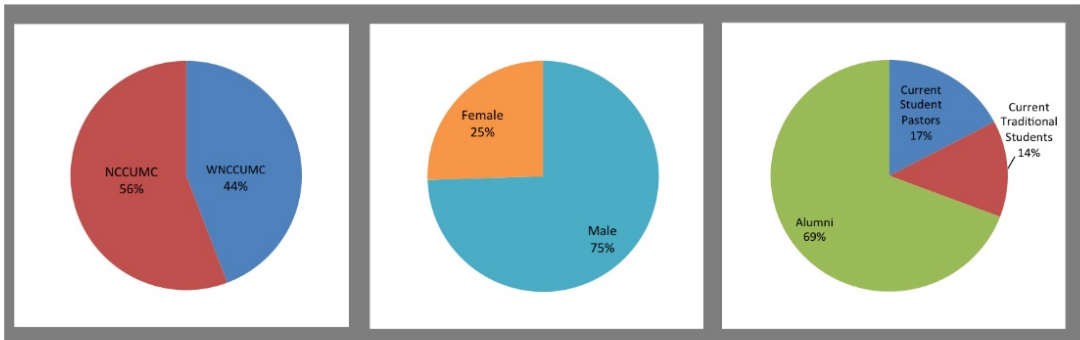
The survey was open from October to December of 2015. 52 of 59 Fellows responded (88%).

We did a simple analysis of non-response comparing the survey respondents with the TRCI Roster of 59 current and graduated Fellows. We looked at gender, race/ethnicity, conference and status in the program (student, student pastor and alumni).

Roster of all Fellows (N=59)



2015 Rural Fellows Survey Respondents (N=52)



# Enhanced Clergy Capacity

Traditional students and student pastors feel equally prepared after graduation. The key difference - not surprisingly - is that traditional students feel prepared for their first appointments through a combination of TRCI activities and Field Ed, and student pastors feel prepared through a combination of TRCI activities and "on-the-job training."

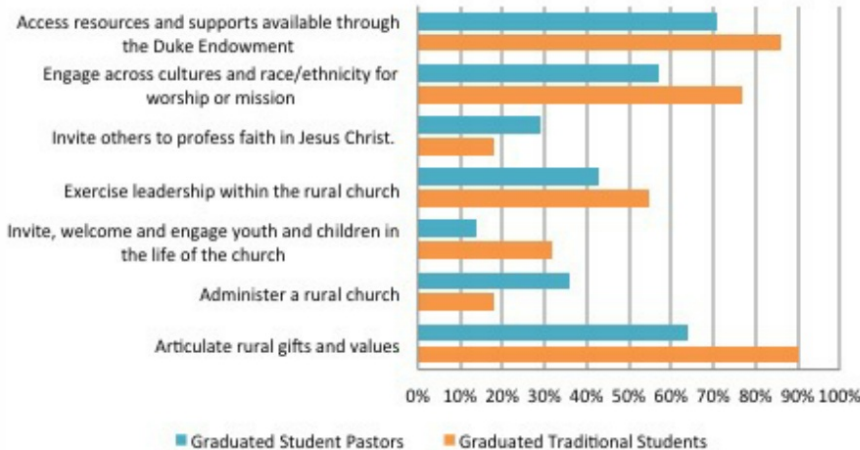
"I feel most prepared to explain my calling specifically to the rural church. I have a clear sense of the value of rural communities and the churches that serve them."

- A Current Traditional Student Rural Fellow

TOC Outcome Area 1: Greater effectiveness of pastors working in rural settings

Some Notes on Student Pastors vs. Traditional Students

## TRCI contributed enormously to my ability to:



"I've learned more being a student pastor than I have [at DDS]. I preach every week, I do hospital visits, I've done eleven funerals. It would be terrifying to go into those things without that. It gives you confidence. You learn what to expect. It does prepare you."

- Graduated Rural Fellow/ Student Pastor

"I feel most prepared to lead by preaching the gospel and teaching it in a way that would give life and hope to the small membership, rural church."

- Rural Fellow/Traditional Student

Of the 19 current student TRCI Fellows, 11 are student pastors and 8 are traditional students.

Of the current students from the North Carolina Conference: 10 are student pastors and 3 are traditional students

Of the current students from the Western North Carolina Conference, 1 is a student pastor 5 are traditional students

Overall, we find few differences among the self-reports of student pastors in terms of their levels of preparedness and the benefits of being part of TRCI, other than what one might expect. Student pastors have expressed concerns about the pressures and time commitment of their positions, but most also appreciate the chance to gain practical experience. Some traditional students, on the other hand, have expressed concern on missing out on network building among student pastors.

Note on diversity: student pastors are disproportionately male and second career clergy, and similarly homogeneous with respect to race/ethnicity. 20 of the 23 student pastors in the most recent Fellows survey are male (87%), and 19 (83%) are second career clergy. 18 of the 20 identify as white, caucasian or a combination of European ethnicities.

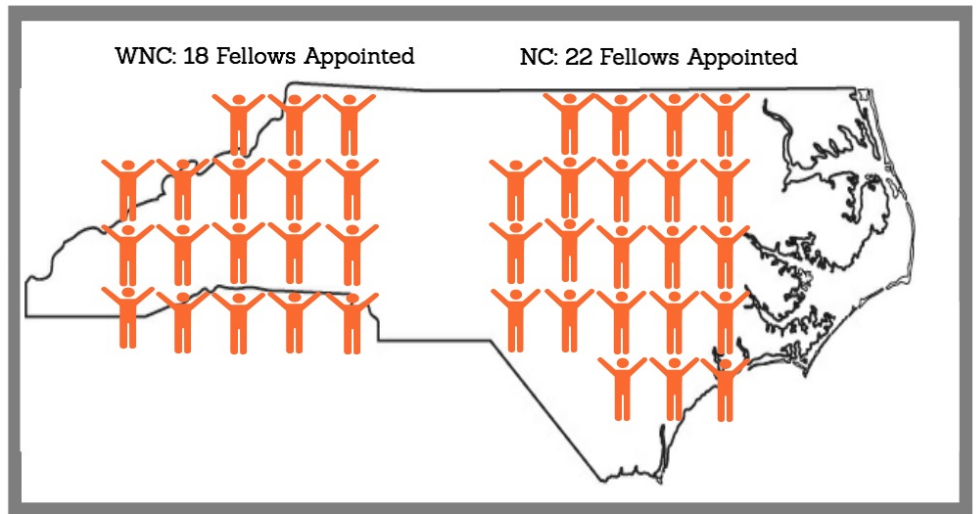


# Enhanced Clergy Capacity

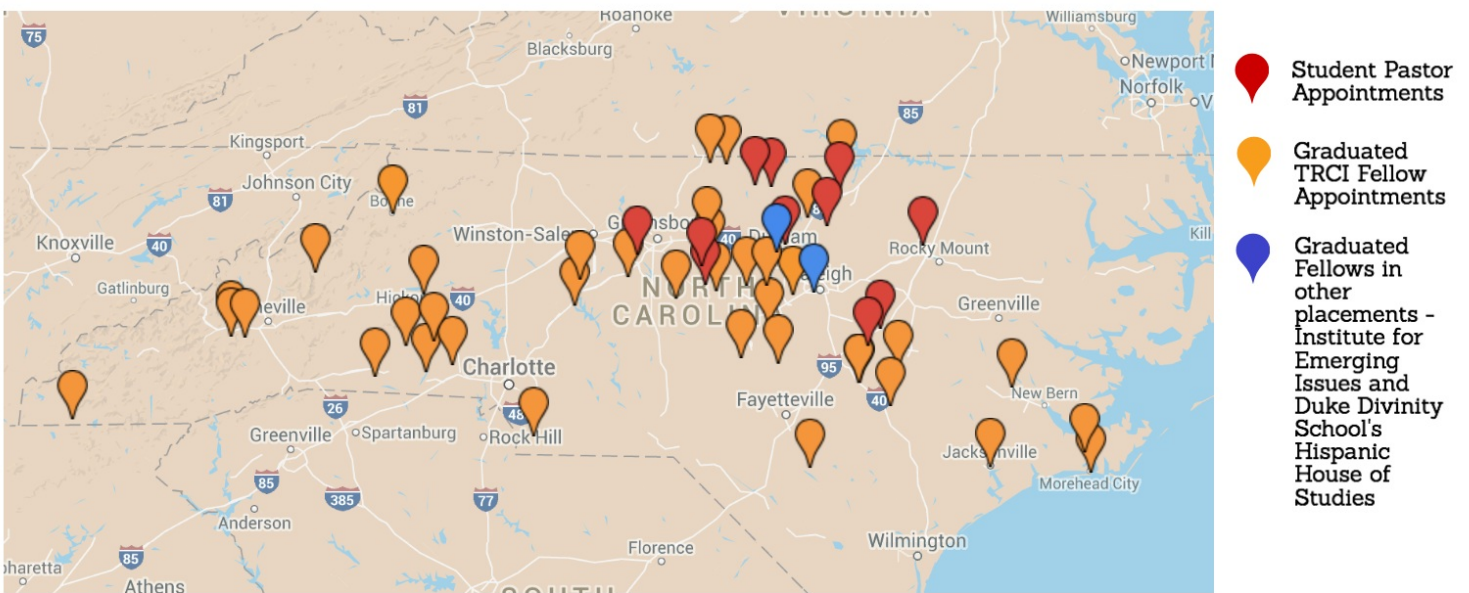
TRCI continues to contribute to building a critical mass of well-trained rural clergy.

TOC Outcome Area 2: Increased number of pastors with calling and skills for rural ministry and who can be potential leaders among peers and effective advocates within stakeholder institutions

Of the current TRCI Rural Fellows network of 59, 40 are graduated and serving a church or in another leadership position. Of those 40, 22 are part of the NCCUMC and 18 are part of the WNCCUMC. 19 of the 59 are still enrolled as traditional students (8) or student pastors (11). Of the 19 students, 13 are from the NCCUMC and 6 are from the WNCCUMC. Note that data are current as of December 2015.



## TRCI Fellow Appointments as of December 2015



# Enhanced Clergy Capacity

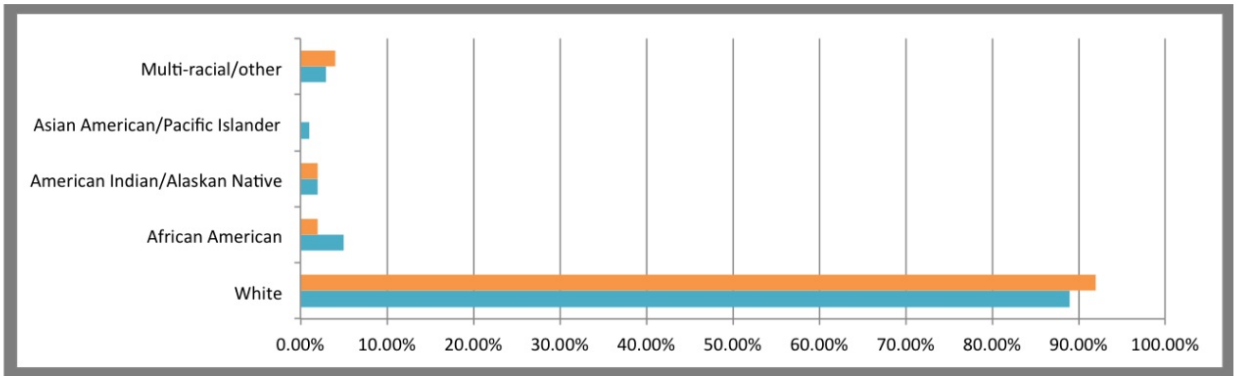
Fellows remain homogeneous as a group (90% are white; 73% are male). Many Fellows feel called and formed to engage beyond the church walls. Many would appreciate more training and support for that work.

TOC Outcome Area 2 (contd.): Increased number of pastors with calling and skills for rural ministry and who can be potential leaders among peers and effective advocates within stakeholder institutions

## Diversity Among Rural Fellows:

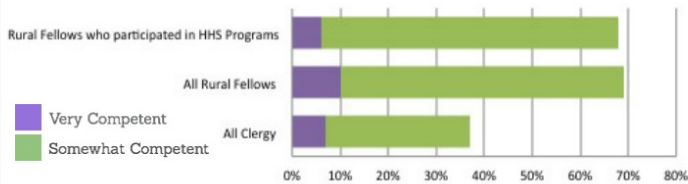
Fellows are about the same gender and race distribution as current UMC clergy in the two North Carolina Conferences (27% of TRCI Fellows are female, as are 31% NC clergy, per the 2014 Clergy Health Survey; race/ethnicity comparison below). The program was not specifically intended to increase diversity among Rural Clergy. However, the fact that TRCI is maintaining the status quo to this extent is a missed opportunity. TRCI and the stakeholders are well aware of the lack of racial/ethnic and gender diversity among Fellows, and are struggling to find pipeline strategies that will make a difference.

■ All NC Appointed Clergy, per 2014 Clergy Health Data  
 ■ TRCI Fellows, per 2015 Survey

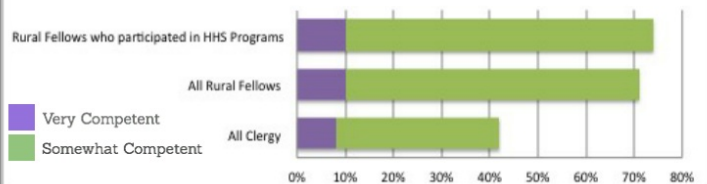


## Rural Fellows on Inclusion Compared to all NC/WNC Clergy

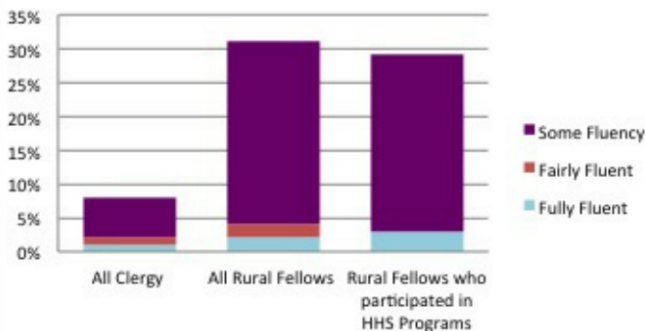
At the current time, how competent do you feel to establish effective missions in your community that serve people of Latino or Hispanic backgrounds?



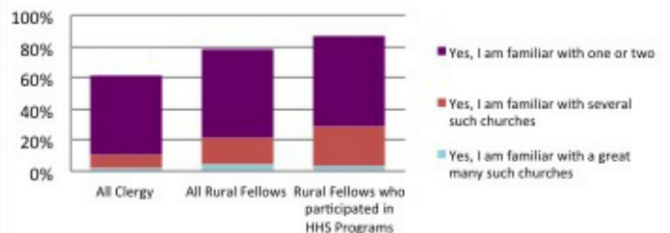
At the current time, how competent do you feel to minister to people of Latino or Hispanic background who might want to become members of the church/charge you are currently serving?



### Self-reported Spanish Language Fluency



Are you familiar with any North Carolina or Western North Carolina United Methodist Churches or charges that are particularly great at engaging with people of Latino or Hispanic background?



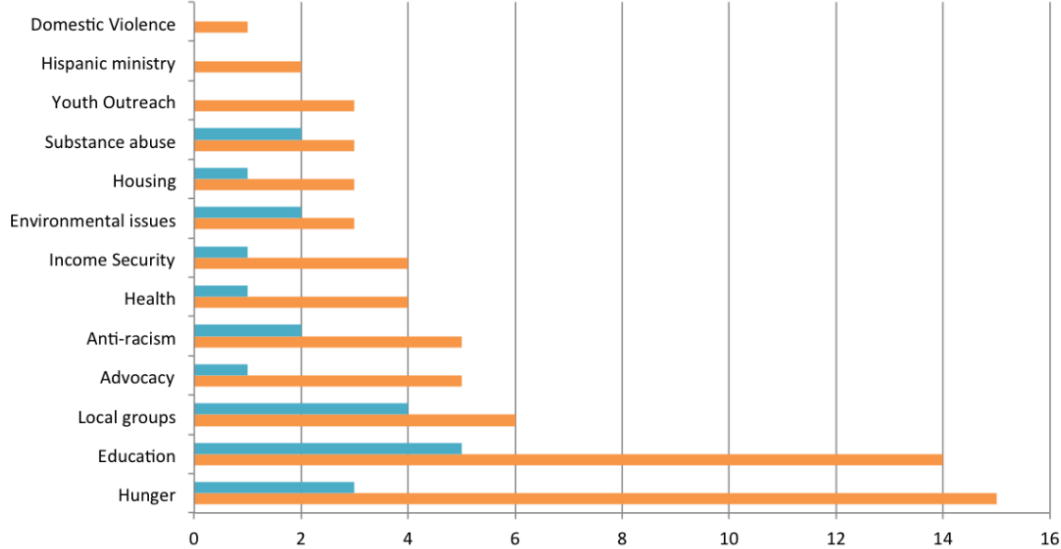


# Thriving Rural Churches & Congregations

There is early evidence that Rural Fellows assume leadership roles. At the same time, many Fellows report not knowing how to effectively lead a resistant or cautious congregation towards change, or how to meet the most serious congregant needs.

## TOC Outcome Area 1: More effective leadership

Fellows serving churches: At this point, have you found yourself taking on any particular issues in the communities outside your church(es)? Please describe.



■ Issues cited by Fellows serving a church as alum or student pastors  
■ Number of Fellows who mentioned this specific issue and their comment indicated the mission is pastor led (e.g. they started it, they brought to the congregation, they were the person serving on the local board or group)

## Fellows on their Preparedness for Rural Ministry and Addressing Change

"I feel] fairly well prepared...I have been serving in the rural church for over four years now and I feel comfortable in that setting. I feel well prepared for the particular nuances of rural life, the rhythms of rural NC, and the particular dynamics of rural church relationships. The area in which I find the most struggle is in helping the congregation to embrace the broader community. After four years here I still find it difficult to help the congregation see that there is a world outside their church and that they need to embrace that world."

- A Graduated and Appointed Rural Fellow

"One of the most frustrating things I see is that many of our partner churches in the TRC seem to be an exception rather than a rule. In other words, leadership is not the total answer. These congregations seemed ready to embrace that leadership. Unfortunately, not all of our rural congregations are in this place. What do we do with congregations who are resistant to change over time and under various leadership?"

- A Current Student Pastor Rural Fellow

"I would say that I am well prepared to serve a rural UMC, in NC. I felt most prepared for entering into listening relationships with people who are terrified with change."

- A Graduated and Appointed Rural Fellow

"I feel most prepared to Pastor in general in the rural setting. I feel least prepared to help Rural churches understand the need to change for the next generation."

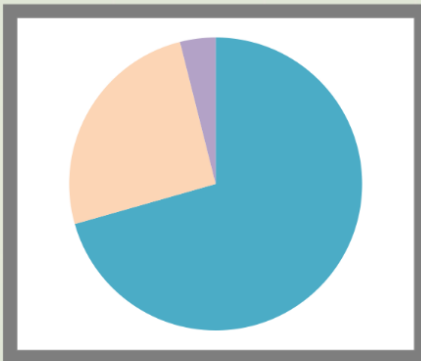
- A Graduated and Appointed Rural Fellow

# Thriving Rural Churches & Congregations

Laity do feel valued by the investment they feel the stakeholder institutions are making in leadership for rural churches. At the same time, some Rural Fellows and laity feel "unimportant" based on what they see as lack of resources and isolation which they attribute to being in small rural churches.

## TOC Outcome Area 2: Rural congregations know and value their unique gifts

Appointed Fellows - Are you currently serving a TDE eligible rural church? (Per 2015 Rural Fellows Survey)



"People live here because they want to live in a rural community. I used to live in Charlotte, and I would never move back. The fellowship is completely different here."

- Lay Leader at TRCI 2.0 Partner Church

"When we first moved here we visited a lot of the UMCs around here, and we found that the family structure in some of the smaller churches was too strong to make us feel welcome. We now create our family connections within the church. And on the other hand, I appreciate that those family ties are there, as opposed to some other churches where it feels like a revolving door."

- Lay Leader at TRCI 2.0 Partner Church

"Seeing a rural congregation that's thriving, and you don't have to go to statistics. We don't have any growth here in the area. To me, you can drive here and think that nothing is out here, but then see 100 some people that are here to worship. It's amazing to see what the body of Christ can do. There's advantages to having a bigger population. But the Holy Spirit will gravitate people to it. When we're faithful to God and teach the word and trust the people, they can do awesome stuff."

- Pastor at TRCI 2.0 Partner Church

We asked lay leaders at TRCI 2.0 Partner Churches to describe their church in one word. This display shows their most popular responses in the largest print.



## TOC Outcome Area 3: Measures of vitality increased

In terms of the effectiveness of Fellows' leadership, in growth or thriving measures, it is still too early to know. We can say that about two-thirds of Fellows say they have found themselves taking on at least one particular issue in the community outside their church, and 70% note their church has started at least one new hands-on local mission during their tenure.



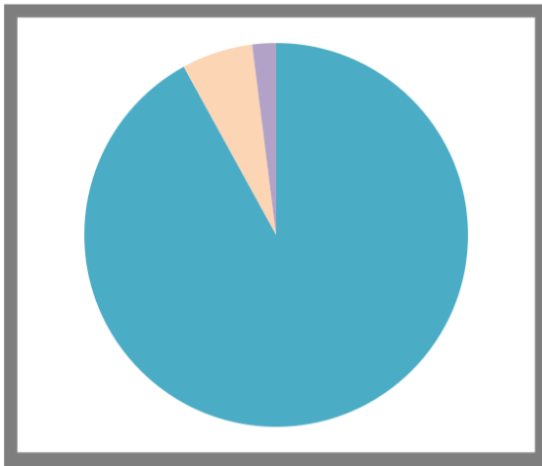
# Thriving Rural Churches & Congregations

Nearly all Fellows cite exposure to a variety of thriving rural churches as a benefit of the initiative, as intended. Many offer at least one specific example of ways in which the conference, DDS and/or the Duke Endowment demonstrates and supports rural clergy and congregations (see Enlightened Stakeholders section).

TOC Outcome Area 4: Models of thriving rural churches are known and valued by clergy, congregations and stakeholder institutions

## Stakeholders' Awareness of Models of Thriving Rural Churches

Rural Fellows - Has TRCI contributed to your exposure to different ways that rural churches thrive?



93%

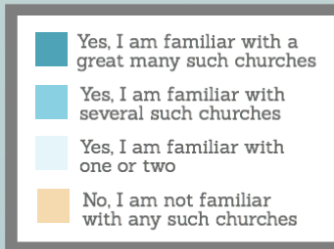
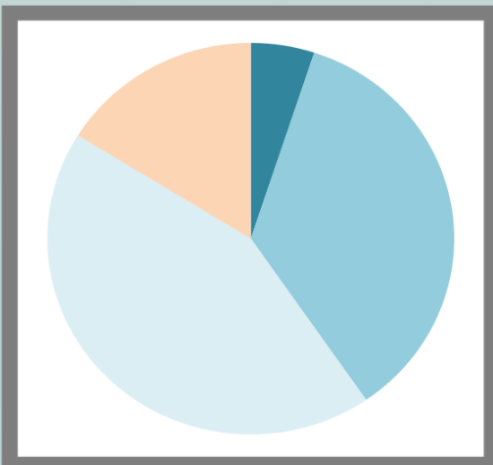
of Fellows who were/are not student pastors have completed field education at one of the TRCI churches

58%

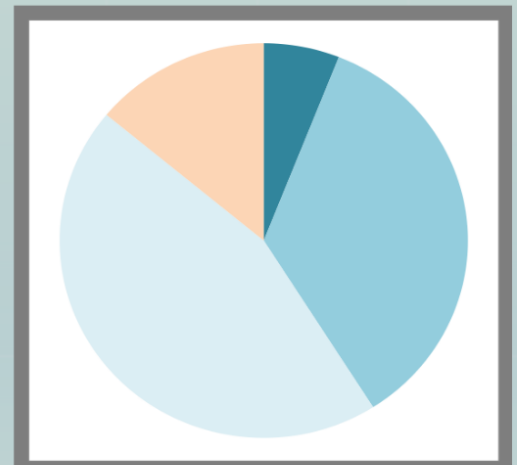
of Fellows say that they have experienced mentoring by their field education pastor as a benefit of TRCI

All NC Clergy - Are you familiar with any rural North Carolina or Western North Carolina United Methodist churches or charges that you would say are thriving?

All NC and WNC Clergy, per Clergy Health 2011



Rural NC and WNC Clergy, per Clergy Health 2011



# Stronger Rural Communities

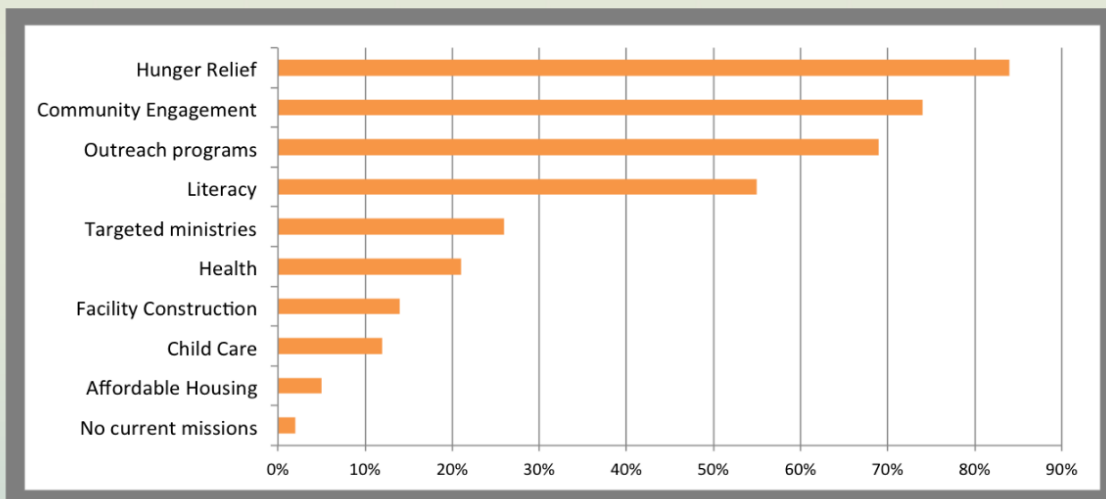
Rural Fellows are engaging in mission work in a variety of areas. They note a range of benefits of that work to their churches and communities, as well as some challenges to creating lasting change.

## TOC Outcome Areas:

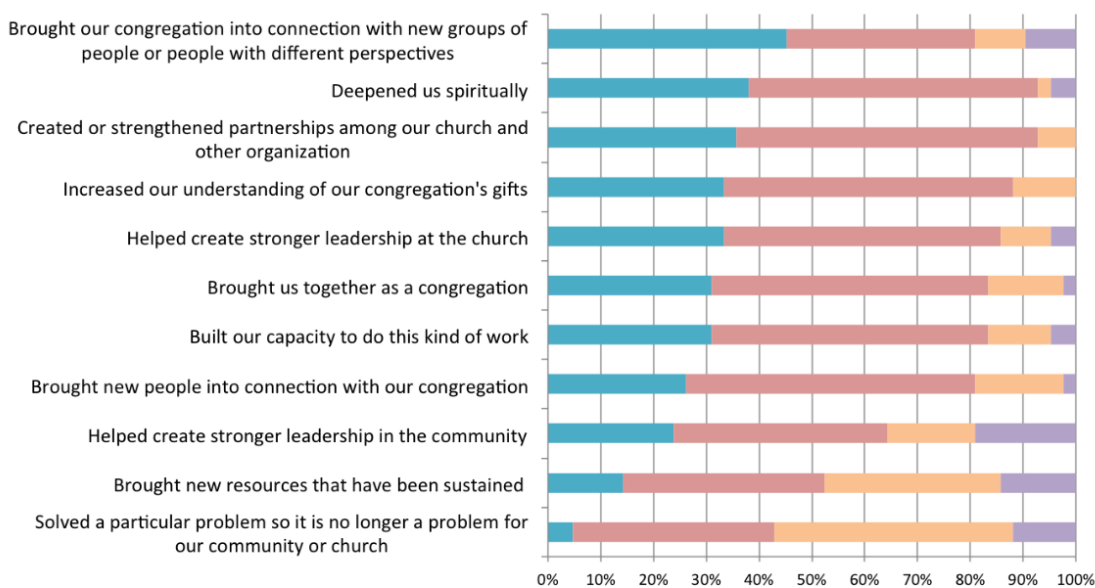
Churches contribute to expanded child care, increased social capital and greater social well-being

## Fellows Currently Serving Churches - Mission Work

The next questions have to do with hands-on, local missions in which you and your church(es) are involved. Are you currently doing mission work in any of the following areas?



For each of the items below, please select an answer that reflects your observations about potential outcomes in your church and/or community. Our local, hands-on missions have:



■ Yes, a great deal  
■ Yes, somewhat  
■ No  
■ Not sure



# Stronger Rural Communities

Most appointed Rural Fellows have started new hands-on, local missions in their churches. About 30% of these new missions have been funded through the Duke Endowment or TRCI.

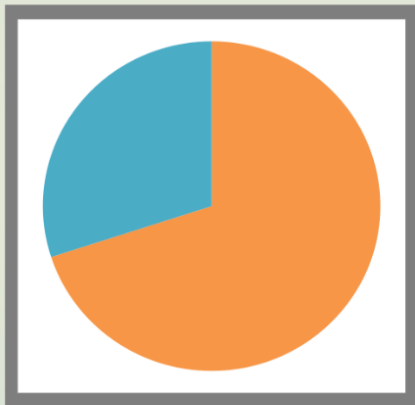
## TOC Outcome Areas:

Churches contribute to expanded child care, increased social capital and greater social well-being

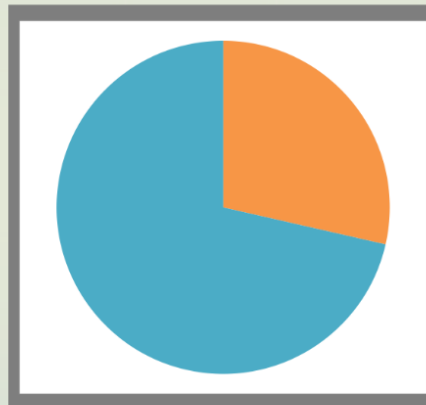
## Graduated and Appointed Rural Fellows and Student Pastors Starting Missions

Have any new hands-on local missions begun during your time at your current church?

■ No  
■ Yes



Are any of your current hands-on local missions funded through the Duke Endowment and/or TRCI?



## How do key stakeholders approach addressing issues in their communities?

### TRCI Partner Churches

"When you go into a larger city, there's a central core of services. They don't typically exist rurally. We have to be able to help fill that."

- Lay Leader at Partner Church

"You just have to have your church available. There are churches in our area that don't use their building. We really believe that if you use your building for two hours a week, that's kind of an indictment."

- Pastor at Partner Church

Our community reaches out to our folks, not just here at the church but outside it too. We're a shoulder to lean on, ears to hear and hands to hold. A community is our family. If we see one hurting, we're there and show our kindness and love to them. Someone in need is a member of our community.

- Lay Leader at Partner Church

### Churches served by TRCI Fellows

"People in a rural place, they tend to live in a box. They have their area, and that's what they focus on. I don't think God meant for that. We have so much that we can share with the more outlying areas...You can't sit there with it."

- Lay Leader at a Fellow's Church

On working with populations different from your own: "It's not about charity. It's about relationship and love and letting them know that we are their family here. That's real important for them. They are our friends, not a charity case. We pray for them and their family. We want them to feel that they are known. We would eat with them, and there was so much laughter. They couldn't understand much of most we said, but there was a closeness."

- Lay Leader at a Fellow's Church

# Enlightened Stakeholder Institutions

*There's very little for which I felt unprepared coming out of Divinity School as a Rural Fellow. TRCI was instrumental in my development as a pastoral leader called to the rural church. The program was efficient in helping me to make necessary connections within my conference, the Duke Endowment, and understanding the contextual elements of rural communities and how God has called me to serve them faithfully.*

A Graduated and Appointed Fellow in the North Carolina Conference

## Update on Stakeholder Engagement for this Interim Report

TRCI was designed as a partnership among the Duke Divinity School, WNCUMC, NCCUMC and the Duke Endowment. Per its theory of change, TRCI is expected to provide learning that the partners might use to refine their own policies and practices in support of thriving rural clergy, churches and communities, if warranted.

Findings were mixed in the area of Stakeholder Engagement as of the 2014 TRCI 1.0 summative evaluation report. Indicators of progress in the theory of change include: information sharing in support of Fellows' ordination and appointments, visible ways each Conference highlighted rural churches and issues, and Cabinet and DS appointments of clergy serving TRCI partner churches. At the same time, both conferences were very focused on traditional growth measures to assess church vitality, there was not a clear path for sustainability or institutionalization of TRCI over time, and, while all partners saw the importance of building lay capacity towards thriving, there was not a specific plan in place for that work to be done, either individually or collectively.

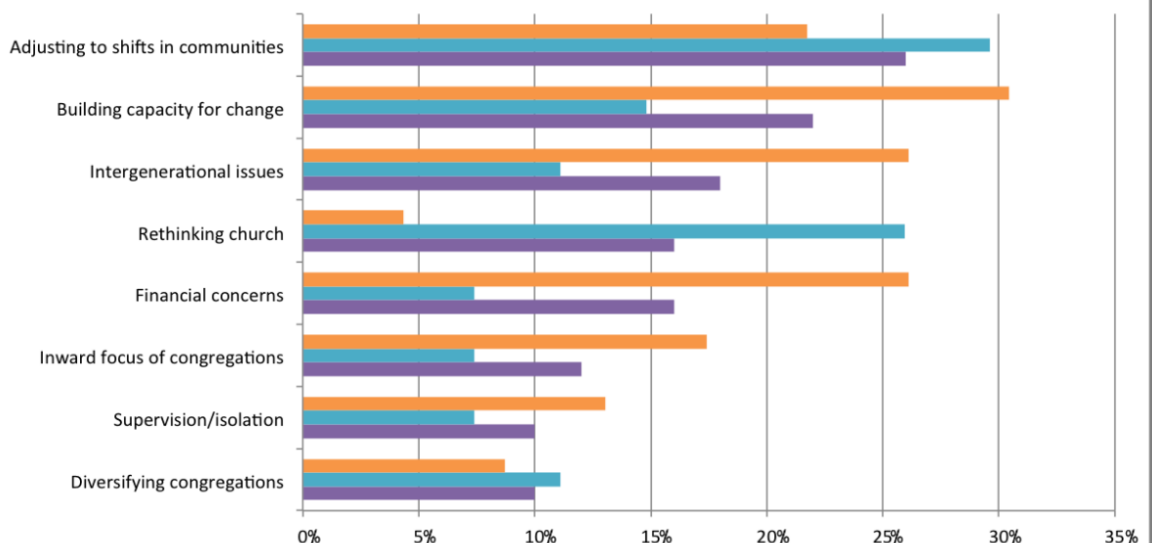
Findings in this area remain mixed. In terms of progress, the number of Rural Fellows appointed to rural churches continues to expand. The partners have met to discuss key issues. Those issues included the rural fellow pipeline, lay leadership, inclusion and diversity and the partnership itself. They are in the early stages of working together to see if there are ways to address inclusion. TRCI has made it a point to include lay leaders in some of its capacity building opportunities, for example in IEI training and supports. At the same time, in these very challenging times, some previous issues remain and there are new ones. Some Fellows are having difficulty getting through the ordination process in a timely manner. Some are appointed to unhealthy churches. The pipeline for Rural Fellows remains mostly white and predominantly male. And, so far as we know, the partners have not yet worked together towards a longer-term plan for sustainability of TRCI's key functions or strategies, if warranted.

## Key Challenges in Rural Ministry, Per Rural Fellows 2015 Survey

What do you see as the key challenges in rural ministry going forward? (most common responses shown)

(most common responses shown)

■ Fellows in WNCUMC  
■ Fellows in NCCUMC  
■ All Fellows



# Enlightened Stakeholder Institutions

After a period of leadership transitions and lessened engagement, the partners have begun to meet again to discuss key issues, including the Rural Fellow pipeline, inclusion, the partnership itself, and training for lay leadership around issues of thriving.

## TOC Outcome Area 1:

Benefits Duke Divinity School - A more clearly defined pedagogy for training in rural ministry.

"I can tell you what I appreciate about [TRCI] now - it continues to see the need for evolution. That gives me hope. It's not a static material to be passed down and regurgitated. It's a fairly new program, but there's still this idea that we need to continue to evolve, and to assess what's working. So just that we're being asked the question gives me confidence."

- A Graduated and Appointed Fellow in the WNC Conference

## Rural Fellows on how the Duke Divinity School can help address challenges in rural ministry:

"Duke Divinity needs to have a better understanding of mission and outreach as a whole...TRC needs to link with other partners, and embed community engagement as a priority."

"Teach students creative ways to speak truth to power, without alienating the older generation of the Church."

"Bring in practitioners in the field to teach fellows of the challenges from theological and practical experiences."

"I wonder if more could be done for the student pastors in TRCI to encourage/mentor them over the summer months as an enhanced field ed experience."

"I think we can do a lot more with the Hispanic House. I think there is more we can do to diversify the program."

"Provide an overall vision for rural church ministry in United Methodism, in coordination with the two annual conferences."

"More preparation and guidance for how to respond [to political conflict]."

"Court second career clergy even after they have been accepted to Duke...They likely don't have anything to prove...so they are more open to partnering with other churches/clergy."

## TOC Outcome Area 2:

Benefit to NCCUMC and WNCUMC - Rural congregations affirmed, resourced and supported

## Rural Fellows on how the NC and WNC Conferences can help address challenges in rural ministry:

"The conference has to stop "rewarding" pastors by moving "good" pastors to larger churches. This makes the rural church feel less important."

"Continu[e] to value the ministry of the rural church as an effective agent of community change and providing guidance in how that can play out within communities."

"The Conference can do a better job, at the Cabinet level, of supporting the creative and expressive ideas of its new pastors..."

"Assist churches who struggle financially and ensure that the rural churches are represented in the various boards and committees at the Conference level."

"The conference can stop treating our small membership rural churches as an afterthought and begin to see them as a central and meaningful part of our connection. This would entail broadening support for the TRC program, committing to send quality pastors (not just those who are paying their dues in hopes of a larger church) and extending pastoral appointments to allow adequate time to build relationships that will lead to mission."



# Enlightened Stakeholder Institutions

There is some traction on the Rural Fellow pipeline – the TRCI Director has a number of high quality candidates for next year’s incoming class, in part through recommendations and support from the Conferences and the Duke Divinity School. The stakeholder institution partners are also in early stages of working together on issues of inclusion.

## What are the Boards of Ordained Ministries Looking for?

Quotes below are from members of the Board of Ordained Ministries in one of the North Carolina Conferences:

"There is the basic - people need to communicate well in preaching, writing and teaching. And then we also look for leadership ability - can they work with a team, help a church move forward. We expect them to be in community, not just for themselves. They should be connectional in nature. In rural settings people can feel isolated and get a lone ranger mentality. We expect them to be lifelong learners. That's a beautiful thing I've seen in TRC - they do continuing education and get them together in cohorts. We also expect that pastors will see their ministry as not just to the church, but to the community around it. That's important in rural places, where you often have the opportunity to be pastor to the community."

"We try to know if this is someone who can serve effectively in a multitude of contexts. None of us can serve any church. That's a fallacy. But if we have too many people who can only serve in a small piece of the pie, that's a problem. We don't want to peg somebody as only a rural person, that early in someone's ministry."

"Innovation – the ability to see the gospel and the church for a new century, and to step out of the box while being theologically sound. You have to go to people. How do you build relationships and communities? With that idea, you will need some skills in navigating current structures to change them to a structure that will be successful in the future. If you are innovative, you will have to find ways of navigating – helping those invested into the old structure move to a new one, and to know what is good about the old way to move forward. They need strong communication skills and preaching skills for this."

### TOC Outcome Area 3:

Benefit to The Duke Endowment - More effective rural ministry and more effective, targeted grant making

## Rural Fellows' Access to and Awareness of Duke Endowment Resources

All Fellows: Has your involvement in TRCI help you better understand resources and supports available through the Duke Endowment?

Fellows serving churches: Are any of your current hands-on local missions funded through the Duke Endowment and/or TRCI?

