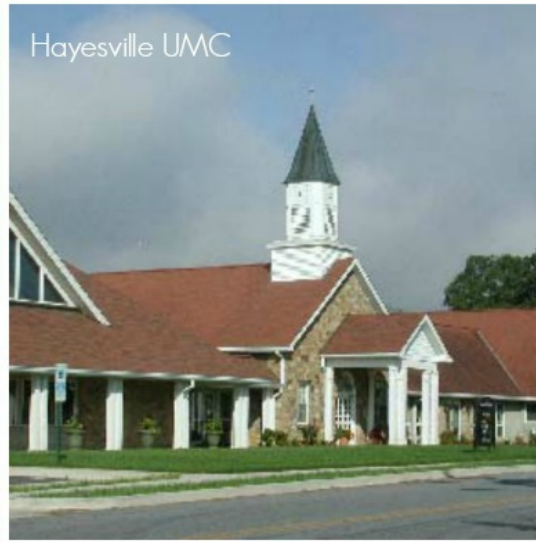


# Thriving Rural Communities Initiative Summative Evaluation Report

## Executive Summary

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Center for Assessment and Policy Development (CAPD)

for

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THE DUKE ENDOWMENT

## Executive Summary

This Executive Summary highlights the major findings from our evaluation of the Thriving Rural Communities Initiative (TRCI), reported more fully in the TRCI six-year summative evaluation report. Along with their considerable gifts, many of the rural United Methodist churches in North Carolina face challenges. They can be resilient, but also resist change. They can serve as community anchors, but become insular in membership. And, they can be rich in mission, spirit and worship but still feel themselves scarce in resources. Those charged with helping to form rural clergy (congregations, seminary, the Conferences) may want innovative and effective leadership that can draw out these gifts, navigate these challenges and enrich and grow the churches; however, those entities may have multiple, competing priorities. Clergy and their congregations can feel this as lack of interest in their survival and growth.

Consistent with James Duke's indenture forming The Duke Endowment (TDE), and the goals and emphases of its Rural Church division, TRCI was specifically created to contribute to the formation of effective leadership for rural United Methodist churches in North Carolina, in ways that will benefit the churches and the communities they serve, with the above context in mind. Or, to put TRCI's goals in spiritual terms, *"The Thriving Rural Communities Initiative works to foster thriving rural North Carolina communities by cultivating faithful rural Christian leadership and fruitful United Methodist congregations."*

### Program Structure and Theory of Change

TRCI operates as a program of the Duke Divinity School (DDS). It was conceived of as a partnership among four stakeholder institutions: The Duke Divinity School, The Duke Endowment, The Western North Carolina Conference of the United Methodist Church and the North Carolina Conference of the United Methodist Church. TRCI's main strategies and intended direct and indirect benefits (outcomes) are described in the theory of change (Figure 1). To implement the strategies, TRCI provides special training and supports to a cohort of students at the Duke Divinity School with a calling and commitment to serving rural United Methodist churches in North Carolina, while they are in school and in their early appointments. It also operates several other programs and activities designed to support current rural clergy and their congregations, and to extoll and validate rural clergy, churches and congregations more generally.

### Approach to Evaluation

The evaluation used a combination of qualitative and quantitative methods to track the implementation of TRCI and early benefits to students, clergy, churches and stakeholder institutions, and to share learning with the program and TDE. Evaluation began as TRCI was being developed, so early work focused on understanding the goals and priorities for TRCI, and the extent to which proposed strategies, even if implemented extremely well, were likely to contribute to the full set of hoped for goals.<sup>1</sup> Over the course of evaluation, in-depth data on

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<sup>1</sup> That early work suggested that the initial strategies – the Rural Fellows and TRCI partner churches – were likely to be powerful in the long-term, but in the short-term, might have limited reach to large numbers of clergy, congregations and communities. The TRCI director thus expanded TRCI strategies to engage more directly with rural clergy, individual churches and congregations, and with conferences and districts. The expanded strategies are reflected in Figure 1.

| Strategies   | Direct and Indirect Intended Outcomes  |
|--|--|
| <p><b>Enhanced Capacity of Rural Clergy</b></p> <ul style="list-style-type: none"> <li>❖ Special training for DDS MDiv students with a calling and commitment to serving rural churches (Rural Fellows)</li> <li>❖ Exposure to several models of thriving rural churches (TRCI partner churches)</li> <li>❖ Peer (network) and program support for pastors placed with rural churches</li> </ul> | <p><u>Benefits to Rural Clergy:</u></p> <ul style="list-style-type: none"> <li>• Greater effectiveness of pastors working in rural settings</li> <li>• 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</li> </ul>  |
| <p><b>Thriving Rural Churches &amp; Congregations</b></p> <ul style="list-style-type: none"> <li>❖ TRCI activities and relationships infuse congregations with a sense of their gifts</li> <li>❖ Conferences and DDS support and validate rural churches by promoting effective pathways to thriving and extolling successful examples</li> </ul>  | <p><u>Benefits to Rural Churches:</u></p> <ul style="list-style-type: none"> <li>• More effective leadership</li> <li>• Rural congregations know and value their unique gifts</li> <li>• Measures of vitality increased</li> <li>• Models of thriving rural churches are known and valued by clergy, congregations and stakeholder institutions</li> </ul>   |
| <p><b>Stronger Rural Communities</b></p> <ul style="list-style-type: none"> <li>❖ Programs and activities that meet community needs are carried out by increasingly vital congregations</li> </ul>   | <p><u>Benefits to Rural Communities:</u><br/>Churches contribute to:</p> <ul style="list-style-type: none"> <li>• Expanded child care</li> <li>• Increased social capital</li> <li>• Greater social well-being</li> </ul>  |
| <p><b>Enlightened Stakeholder Institutions</b></p> <ul style="list-style-type: none"> <li>❖ Encourage reflection and reassessment of policies and practices with regard to formation and ongoing support of rural clergy and lay leaders, and support to congregations, churches and communities</li> </ul>  | <p><u>Benefits to Duke Divinity School:</u></p> <ul style="list-style-type: none"> <li>• A more clearly defined pedagogy for training in rural ministry</li> </ul> <p><u>Benefits to NC and WNC Conferences:</u></p> <ul style="list-style-type: none"> <li>• Rural congregations affirmed, resourced and supported</li> </ul> <p><u>Benefits to TDE:</u></p> <ul style="list-style-type: none"> <li>• More effective rural ministry and more effective, targeted grantmaking</li> </ul> |

FIGURE 1 – TRCI Theory of Change

program implementation and benefits were collected via interviews with TRCI program participants, observers and stakeholders, plus observation of program activities and site visits to TRCI partner churches and churches served by graduated and appointed Rural Fellows.<sup>2</sup> These individual interviews and site visits were supplemented by a survey of all United Methodist Church (UMC) North Carolina clergy in 2010/11, for baseline and early data on the reach of TRCI strategies and perceptions of their value to participants’ ministry, and a survey of all Rural Fellows in 2013 to capture updated and complete data on learning, application and perceived benefits from their perspectives.

In addition, early on, the evaluation conducted site visits to seven of the eight TRCI partner churches to learn more about what “thriving” means in practice, and thus, what rural clergy

<sup>2</sup> From 2007-2013, the following were interviewed at least once in person, by telephone and/or via online survey: TRCI Director, all Rural Fellows as of October 2013, clergy and lay leaders of all TRCI 1.0 partner churches, the Bishops, representatives of the Boards of Ordained Ministries, and several District Superintendents of both conferences, the Dean of the Duke Divinity School and administrators overseeing TRCI, each TRCI partner church pastor, each Bishop, several District Superintendents, staff of The Duke Endowment and the Dean, Admissions Officer and several other stakeholders at Duke Divinity School.

need to know and do in order to be effective. Those findings informed subsequent data collection and analysis. They also contributed to a TRCI reflection and assessment tool that is one of the products of the evaluation.

## Major Findings

**Considerable evidence has accumulated over the past five years to indicate that TRCI is making progress towards the outcomes anticipated by its Theory of Change. Leadership is being developed for rural United Methodist churches in North Carolina, as intended. Fellows are seizing opportunities to learn and connect, and strong networks are being formed and activated. Strategies have also expanded to reach beyond the Rural Fellows to other rural clergy and lay people, expanding leadership development and potential networks of support and innovation. There are also multiple examples of TRCI infusion into stakeholder institutions, and simultaneously, opportunities for greater partnership towards going to scale.**

*Enhanced Capacity of Rural Clergy:* As intended, TRCI is enrolling Fellows “with a heart for the rural church,” who benefit from the learning, supports and experiences that TRCI makes available to them. Twenty-two Rural Fellows are graduated. They are distributed across the North Carolina and Western North Carolina Conferences (12 in NCCUMC and 10 in WNCUMC), and all but two are serving in TDE eligible rural churches (one directs the Thriving Hispanic/Latino Community Initiative and the other serves a rural church but not a TDE eligible one). The Fellows and their congregations offer numerous examples of ways in which the specific learning and experiences offered by TRCI are being applied to the benefit of their current churches – in terms of the day to day spiritual and missional life. There are also 24 Rural Fellows in the leadership pipeline and more to be enrolled over the next five years.

*Thriving Rural Churches and Congregations:* As intended, TRCI also identified and partnered with eight different rural churches, each of which provides a model of thriving and opportunities for field education to Rural Fellows. Together, those churches have provided field education opportunities for 25 Rural Fellows so far. Rural Fellows routinely cite these field education experiences as among the most powerful part of their formation, along with support from the TRCI Director and peer connections. One impressive aspect of TRCI is the extent to which it has stretched its boundaries of support beyond Rural Fellows to the broader group of TDE eligible rural churches and those serving them. For example, as of 2011, more than 300 clergy from these churches had participated in at least one of the annual Convocations on the Rural Church, and more than 300 clergy from these churches had participated in a workshop or worship service led by the TRCI project director. Mean ratings by participants of the effectiveness of all activities sponsored by TRCI are above 3 on a 4-point scale.

*Enlightened Stakeholder Institutions:* There are also some examples of learning from TRCI being infused within the stakeholder institutions. The expansion and infusion of learning from TRCI sets a stage for impact beyond the Rural Fellows and the charges and communities they serve directly. For example, Conference leadership is aware of TRCI, values the Fellows and celebrates rural churches more so than in the recent past. Two former pastors of TRCI partner churches are now District Superintendents, contributing their “voice” on rural churches at the Conference level. At least one believes the visibility from serving a TRCI identified thriving church accounts in part for the welcome that voice is receiving. In addition, over the course of the initiative, both Conferences have become more aware of the strengths and skills of Rural Fellows as a result of

program efforts, and are making placements post-graduation more in line with that understanding. Observers note a growing sense of the value of rural ministry among Duke Divinity School students, not just Rural Fellows. The Rural Church Division of The Duke Endowment has been rethinking its approach to rural church grants, particularly in terms of what it means to fund buildings and how that relates to the purpose to which those buildings are put. Some observers see that shift as an outgrowth of positive learning from TRCI. In addition, The Duke Endowment has continued to support TRCI in recognition of its progress to date and perceived value.

At the same time, there are some challenges that the stakeholder institutions might face together – for example, the best way for rural churches to be able to afford an ordained elder (like a Rural Fellow) – that are not yet part of their collective conversations, suggesting that the hoped for partnership can still be enhanced.

## Recommendations

Rural Fellows are aware of the challenges that Conferences are facing in terms of apportionments, church growth and vitality. They come prepared to do their work with a sharpened imagination and a love for thriving rural churches cultivated and expanded through TRCI. But many are concerned about how church growth is currently measured. They also wonder what kinds of risks they can take in the short term to foster thriving and growth in the long term. When asked if they feel they are being formed to maintain the status quo or interrupt the status quo, answers vary considerably.

It might be important, moving forward, for TRCI to enter this discussion explicitly with all of the stakeholder institutions. This process will help to gain more clarity for the program and for the Fellows.

The transition from TRCI 1.0 to 2.0 is a good moment for the stakeholder institutions collectively to revisit and clarify program assumptions and goals. This action item is not based on “fixing” anything about the program, but rather on working towards a deeper shared understanding of TRCI’s theory of change – its goals and the priority strategies for achieving those goals. The process to develop that deeper understanding together could help build collective ownership of TRCI among stakeholders. Clarity on priority strategies and goals might make it easier for each to see how best to align or alter current resources toward common goals. For example, does TRCI have a goal to contribute to building lay leadership for thriving rural churches? Where do the opportunities and responsibilities lie for that to happen? Similarly, what are the goals for TRCI related to community impact, and what does that imply about Rural Fellow preparation and the choice of TRCI Partner churches? Finally, Rural Fellows are fairly homogeneous with respect to race/ethnicity – is it important for that to change in order to meet program goals? If so, what would it take across the partner institutions to make that happen?

Outcomes to date also suggest several other opportunities and some challenges for TRCI going forward. TRCI is doing what it can, within its own control, to create strong and able leadership for thriving rural churches. The climate for this leadership is challenging. The North Carolina and Western North Carolina United Methodist Conferences are facing declining interest in mainstream Protestant religions in the U.S. generally, plus increased interest in mega-churches among some of the available segments who are mainstream Protestants. While it is certainly

possible to create mega rural churches, it is not easy—nor is it necessarily the best way to thrive. The Duke Divinity School is facing declining seminary enrollments nationally, and more competition for seminary students within North Carolina as a result of the expansion of Hood Theological Seminary. Churches that Rural Fellows serve are often taking a leap of faith to bring on a full-time pastor on the elder track, given the associated costs. And, over the course of the initiative to date, there has been turnover in leadership at all of the stakeholder institutions.

TRCI has walked a very thoughtful line through these challenges to date. It has reached out to Conferences to nominate potential Rural Fellows and TRCI churches. It has shared its lessons in workshops and by serving on various committees and workgroups. It has also encouraged Rural Fellows and other rural pastors to think about thriving in terms of spiritual and mission depth, continually making the case that enlivened worship and meaningful missions will bring worshipers and disciples – major church goals. It has stimulated the imaginations of rural congregations and clergy about ways to do that through exposure to a number of different models of Thriving Rural Churches and customized supports. And it has consistently encouraged the Duke Divinity School and the Conferences to take seriously rural ministry as a valid and satisfying calling and taught classes, offered colloquia and built networks among students and pastors to generate an early sense of what that feels like.

As TRCI goes forward through its own leadership transition, it can continue to be thoughtful about how to form effective leadership in challenging times. Given the current number of Rural Fellows who are also student pastors, it will be important to figure out how to support their formation, including in ways other than field education at TRCI churches (which student pastors generally cannot do). As more student Rural Fellows are graduated and become pastors, it will become even more important to find ways to support that network as they take on their first and subsequent appointments. And, as the Conferences and the Duke Divinity School wrestle with their own pressing challenges, it will take skill, persistence and real partnership to embed attention to rural ministry, rural churches and rural communities more fully within those institutions, if TRCI's values and priorities are to be sustained.