

HISTORY THE CREDO BENEFIT

In response to a perceived need to develop a national resource to contribute to the well-being of the clergy of the Episcopal Church, the Church Pension Fund formed a committee in June 1994 to explore options. For two years, the Wellness Initiatives Advisory Committee extensively researched and explored a variety of possibilities.

The proposals that emerged were presented to the Church at large for consideration and review. The suggested initiatives were tested in four focus groups in diverse areas of the country. Those receiving a favorable response were further developed and tested again by means of a survey mailed in May 1996 to active clergy, retired clergy, and surviving spouses. Of the Church Pension Fund's 14,303 constituents (as of April 1996), 50% responded to the survey. Active clergy responded at a rate of 45%, retired clergy at a rate of 55%, and surviving spouses at a rate of 58%. There was further discussion at the 72nd General Convention (1997) including endorsing resolutions.

Pension benefit initiatives and enhancements implemented by the Board of Trustees after the 72nd General Convention included:

- 17th Consecutive Annual Pension Increase
- Changes to Work After Retirement Regulations
- 30-Year Early Retirement Option
- Increased Spousal Minimum Pensions
- Increased Clergy Minimum Pensions
- Extended Spousal Options

In addition to the pension benefits, the committee recommended a program for clergy offering an opportunity to pause – to take stock of their ministry, their spiritual well-being, their gifts and skills, and their calling to lead God's people in this changing world through an eight-day vocational discernment conference.

The proposal called for the development of three pilot conferences seeking the involvement of a broad representation of clergy from diverse backgrounds and

geographical areas. The premise for the development of the program was the need for effective periodic self-assessment and vocational planning. The program was not intended to be an evaluation of clergy by the Church, but an opportunity for self-assessment in which clergy are helped to make use of their own data for future planning.

As described in the survey, “A group of 30 clergy working with resource faculty would address key components of clergy life: vocational review, spiritual discernment, medical health assessment, and financial planning. Through intensive plenary sessions, small group discussions, and individual counseling to develop a personal summary, clergy would be encouraged to discover clear vocational direction and build an action plan for their future ministry.”

Nearly two-thirds (63%) of all active clergy rated this initiative as excellent or very good. Notably, those clergy unlikely to benefit directly due to age still rated the program highly. Half of all active clergy indicated interest in participating. Topics for the program under consideration at the time of the survey were of great interest to approximately half of active clergy.

Topic	Level of Interest	Level of Interest
	Extremely/Very	Not Very/Not at All
Spiritual Discernment	69%	11%
Ministry Development Skills	62%	10%
Vocational Review	55%	18%
Personal Financial Planning	54%	14%
Theology of Priesthood	50%	17%
Physical/Medical Health	48%	18%

The name finally agreed upon, which captured the spirit of the project, was **Clergy Reflection, Education, Discernment Opportunity**, commonly known by the acronym **CREDO**. (Note: Only “CREDO” without the tagline is currently used since the CREDO benefit is now offered to both clergy and lay employees.)

The Pilot Phase: 1997-1999

A faculty team was recruited to design the actual conference. Led by William S. Craddock, Jr., the faculty met for 18 months and consulted with numerous people throughout the Church as the project developed. In addition to Mr. Craddock (Tennessee), the team included Kate Adams (New York), Deborah P. Burnette (Tennessee), Matthew K. Chew (Arizona), the Rev. James C. Fenhagen II (South Carolina), the Rev. Gay C. Jennings (Ohio), the Rev. Dr. Stephanie J. Nagley (California), and the Rev. Ellen M. Shaver (Maine). This team served as the faculty for the three pilot conferences offered in 1997 and 1998.

During the pilot phase, a CREDO Committee was established to direct and guide the development of the pilot conferences, to oversee the evaluation process, to assume project accountability to the Board of Trustees of the Church Pension Fund, to develop future strategies, and to insure broad representation from key church organizations. The CREDO Committee included representatives from the Board of Trustees of the Church Pension Fund, the Office of Pastoral Development of The Episcopal Church, the Standing Commission on Ministry Development, The Episcopal Church Foundation and Cornerstone, the Church Deployment Board, and the National Network of Episcopal Clergy Associations (NNECA).

Three pilot conferences were held: December 1997 at DaySpring Conference Center in Ellenton, Florida; May 1998 at Fogelman Executive Conference Center in Memphis, Tennessee; and November 1998 at Mater Dolorosa Catholic Retreat Center in Sierra Madre, California.

The pilot conferences were offered to clergy with 10 years of credited service and at least 10 years until normal retirement age. Participants were selected at random from eligible clergy in The Church Pension Fund's database. Eighty-four clergy participated, including 50 men and 34 women. The median age was 49.9.

The cost of the pilot conferences was fully underwritten by the Church Pension Fund. The three conferences were offered with the understanding that each participant

would complete all pre-conference materials, attend the entire eight-day conference, and participate in the post-conference evaluation research.

Dr. Catherine E. Schwoerer, a professor and organizational behavior researcher at the University of Kansas, was hired to conduct a comprehensive assessment and evaluation of the pilot phase. The purpose of the research was “to measure the impact and effectiveness of the CREDO Pilot Conferences in fostering the well-being of participating clergy” (“An Assessment of the CREDO Pilot Project: Its Effectiveness and Impact,” Dr. Catherine E. Schwoerer, February 25, 1999, p.2). Dr. Schwoerer attended the three pilot conferences as well as a majority of faculty planning meetings.

The report presented to the Board of Trustees of the Church Pension Fund in February 1999 stated: “There is significant quantitative and qualitative evidence that the CREDO Conferences have contributed to the well-being of the Episcopal clergy who have participated.” The qualitative evidence demonstrated that most participants view the CREDO experience as a gift of great and continuing value, and an opportunity for meaningful discernment and re-direction. In September 1999, the Church Pension Fund Board approved funding for six conferences in 2000. Four new faculty teams were selected and trained in 1999 to begin leading conferences in 2000.

The Transition Phase: 2000-2001

The year 2000 was a pivotal year in CREDO’s growth. Prior to 2000, the project was in its development or pilot phase. One of the challenges of 2000 was to ensure that the high quality of conferences in the pilot phase could be replicated with new faculty teams. The research and evaluation demonstrated that the transition and expansion was successful. CREDO received resounding affirmation at the 73rd General Convention (2000). Financial support grew with a commitment from the Church Pension Fund for six million dollars over the next five years and from The Episcopal Church Foundation for \$500,000 for that same period.

During 2001, 300 clergy attended 10 CREDO conferences. The second conference for bishops was held in November with 21 bishops in attendance. Two regional CREDO

gatherings were held for anyone who had attended a CREDO conference. Four new faculty teams were developed bringing the total faculty number to 64. Each new faculty member attended a CREDO conference as a participant as well as the Faculty Development Conference. The faculty expansion laid the groundwork for 15 conferences in 2002 and 17 conferences in 2003.

CREDO Becomes a Normative Benefit: 2002 and beyond

By the end of 2003, 1,391 clergy and bishops had attended 54 CREDO conferences.

The third conference for bishops was held in December of 2003. A total of sixty bishops had attended a CREDO conference representing a significant percentage of the House of Bishops. 19.3% of active clergy and bishops had attended a CREDO conference.

27.3% attended by the end of 2004, and 36.6% by the end of 2005.

The addition of a ninth faculty team in 2004 enabled 18 conferences to be held in 2004. Seventy-two CREDO conferences were held by the close of 2004 with over 1,900 clergy and bishops attending.

The number of conferences increased to 21 in 2005. The fourth conference for bishops and the second conference for lay professionals were held in 2005. CREDO conferences were led by a total of 71 faculty members from 35 dioceses and eight provinces. A total of 93 CREDO conferences were held by the close of 2005 with over 2,500 clergy and bishops attending.

2005 was an important year of development for CREDO. Thirty-eight new faculty members were recruited and selected to begin serving on faculty teams during 2006 and 2007. The inaugural conference for Spanish-speaking clergy was held in the fall of 2006. The faculty team was selected in 2005, and the Web site and curriculum materials were translated. Two faculty teams were selected for the inaugural CREDO II conferences in 2006. Clergy were invited to attend a second CREDO conference 6-8 years after attending a first CREDO conference. The eight-day conference structure and process remained the same with significant curriculum design and development taking place in 2005 and 2006.

In November of 2005, the Board of Trustees of the Church Pension Fund extended the CREDO benefit for a new five-year funding cycle for the years 2008-2012.

Twenty-one conferences were offered in 2006 serving 554 participants. Conferences were led by 13 faculty teams with 108 clergy and laity from 48 dioceses serving as CREDO faculty. Approximately 25% of faculty members are people of color, a reflection of CREDO's long-time commitment to diversity in all areas of its work and ministry.

Of particular note during 2006 were three conferences offered for the first time.

- 51 participants attended the inaugural CREDO II conferences held in October and November.
- 26 participants attended the first Spanish CREDO conference. Participants came from 20 dioceses including 5 participants from the Diocese of Puerto Rico.
- The first Lay Professional CREDO conference with the standard eight-day CREDO schedule was held in December. A faculty team was trained, the curriculum was adapted, and the response from participants was excellent with strong qualitative and quantitative evaluations.

Twenty-five conferences were offered in 2007 serving 641 participants. Conferences were led by the same 13 faculty teams that led conferences in 2006. As of December 31, 2007, 138 CREDO conferences have been held serving 3,557 deacons, priests and bishops.

Twenty-eight conferences led by 15 faculty teams were offered in 2008 serving 815 participants. Two new teams offered conferences for retired clergy after a year-long curriculum review and revision process. The Church Pension Fund Board of Trustees approved funding to provide CREDO for Lay Employees enrolled in either the Defined Benefit or Defined Contribution Lay Pension Plan administered by the Church Pension Fund. During the pilot phase, two teams conducted a total of six conferences in 2008-2009. This benefit offering is known as CREDO for Lay Employees.

As of December 31, 2008, 164 CREDO conferences have been held serving 4,372 deacons, priests, bishops, and lay employees.

Thirty-one conferences were offered in 2009 serving 848 participants. Conferences were led by the same 15 faculty teams that lead conferences in 2009. As of December 31, 2009, 192 CREDO conferences have been held serving 5,220 deacons, priests, bishops and lay employees.

Of particular note during 2009 was the first CREDO II conference for bishops, and the first conference for Spanish-speaking clergy held in Province IX in Puenbo, Ecuador.

HISTORY CREDO INSTITUTE, INC.

Incorporated in 2001, the mission of CREDO Institute, Inc. is to serve as a collaborative alliance providing resources for Episcopal leadership and wellness programs with specific emphasis on the oversight and governance of CREDO conferences. CREDO Institute's broader purpose is to ensure the continued growth and vitality of God's people by promoting the welfare and leadership of the clergy, lay employees, and congregations of The Episcopal Church.

As a collaborative alliance, CREDO Institute seeks to join in partnerships with other entities to pursue common objectives related to wellness and leadership issues based on specific criteria and guiding principles. CREDO Institute has opened new avenues for formational, wellness, and leadership-based partnerships and sought financial contributions and other resources from participating organizations and entities within the Episcopal Church and ecumenically.

The Directors of CREDO Institute, Inc. provide review and guidance in the selection and development of collaborative partnerships using the following criteria:

Guiding Principles for Collaborative Partnerships

- **Alignment with the mission of CREDO Institute, Inc.:** Partnerships should be focused on wellness and leadership-related initiatives with an intentional collaboration with other entities.
- **Strategic, systemic, and sustainable:** Partnerships should be structured strategically to engage people and organizations with resources to impact the systems in the Church and with the capacity to be maintained and strengthened over time.
- **Broad participation and ownership:** All entities in a collaborative partnership should be involved in the planning and development, operations, and funding.

- **Comprehensive and ongoing evaluation and research:** Established evaluation standards should be in place to measure performance and assess partnership program impact on the participants, congregations, dioceses, and the Church. A research component should be included in the formation and development of the partnership program.
- **Spiritual focus:** Partnerships should enthusiastically embrace a personal and corporate commitment to build and strengthen Christian community.

A variety of collaborative partnerships have been established.

Fresh Start is a diocesan-led program that seeks to foster healthy relationships among clergy, their congregations and their dioceses during critical periods of transition in clergy leadership. Encouraging open and honest discussion of transitional issues affecting both clergy and congregations, the program's goal is to build a culture in which the mutual ministry of the clergy and congregation starts off on the right foot, enabling their new relationship to begin with a "Fresh Start."

The College for Bishops provides opportunities for education and formation that will strengthen bishops in their personal lives, as diocesan leaders in God's mission and in their vocation to God as a community of bishops in service to the Episcopal Church. The College for Bishops is a collaborative partnership of the House of Bishops, the Office of Pastoral Development, and CREDO Institute, Inc.

Presbyterian CREDO - A formal agreement was negotiated between CREDO Institute, Inc. and The Presbyterian Board of Pensions to license Presbyterian-use of the CREDO program. Three pilot CREDO conferences were conducted in 2005 and 2006. The Board of Pensions hired staff to manage and direct Presbyterian CREDO with the assistance of CREDO Institute, Inc. staff. Twenty-four Presbyterian faculty members were trained in 2007. As of the end of 2009, 21 conferences have been conducted. Three Presbyterian teams are operative in 2010 and seven conferences will be held. The collaborative partnership of Episcopal and Presbyterian CREDO is strong.

All Shall Be Well: An Approach to Wellness

In 2009, *All Shall Be Well: An Approach to Wellness* was released. The book captures the essence of what CREDO has become over the past dozen years. In two-dozen personal reflections centered on the CREDO cycle — Identity, Discernment, Practice, and Transformation — CREDO conference faculty members, advisors, directors, and researchers explore an approach to wellness and vocational and personal transformation. William S. Craddock, Jr., the Managing Director of CREDO Institute, served as the editor. The book was published by Church Publishing, Inc., an affiliate company of the Church Pension Group.

Diocesan Wellness Initiatives

Since 2006, **Diocesan Wellness Initiatives** have included a number of initiatives.

- Six dioceses (Chicago, Louisiana, Massachusetts, Mississippi, Nevada, and San Diego) participated in a gathering to explore the culture of wellness in their respective dioceses. Although the composition and nature of each diocese varied across a wide range of categories, there were common interests in creating long range strategic plans to address wellness.
- A pilot project leveraging use of the CREDO Vocational Profile coupled with mutual ministry review with bishops and diocesan staffs was initiated in 2009 with the Dioceses of Chicago, Newark, and Northwestern Pennsylvania.

Strength for the Journey

Through generous funding from the Church Pension Fund, CREDO Institute is providing resources and programs to the four reorganizing dioceses – Ft. Worth, Pittsburgh, Quincy, and San Joaquin – in order to address the health and wellness of individuals, both clergy and lay, as they take part in this renewal. The project is underway and will continue until 2011.