



Overview: The SIFR Initiative at Iliff

Spiritually-Integrated Financial Resiliency

OVERVIEW

The SIFR Initiative at the Iliff School of Theology is a grant-funded program created to develop financially-resilient leaders who can, in turn, create and sustain financially-resilient institutions. This initiative is designed to generate a culture at Iliff, which supports ongoing theological reflection on our values (both stated and lived) concerning the shared responsibilities of student debt. The initiative will create a compassionate community of accountability among faculty, staff, trustees, students, and denominational partners — an initiative that fosters liberative spiritual integration of the financial stress of student debt.

While the primary beneficiary of this initiative will be the Iliff community as a whole, we anticipate seeing the most significant individual change among participating students, referred to as *SIFR Scholars*. Iliff's Student Services staff selects these students, who are invited to consider making a commitment to the program, which involves:

- Enrolling in four SIFR-related courses;
- Completing several assessment instruments during their Iliff career; and
- Actively engaging their SIFR colleagues in other activities, focused on cohort formation and support.

In return, SIFR Scholars receive training on effective financial management and fundraising, are invited to participate in processes of reflection involving their personal values and history, and are eligible to receive additional matching scholarship funds in support of their education.

HISTORY

In early 2014, the Iliff School of Theology received a \$249,982 grant from the Lilly Endowment as part of Lilly's *Theological School Initiative to Address Economic Issues Facing Future Ministers*. Lilly's initiative, which is administered in cooperation with the Association of Theological Schools' *Economic Challenges*

Facing Future Ministers (ECFFM) program, involves 67 schools across the nation. Within that group of schools, Iliff is one of seven United Methodist seminaries selected to receive grant funding.¹

The Lilly grant provides funding for a three-year initiative designed to address the complex and systemic causes and effects of student debt on future clergy and the institutions they serve. Lilly's goal is to provide funding support for each participating school to examine their approach to theological education and the ways in which that education is financed by students, with the goal of improving the financial well-being of those who intend to enter into ministry. Each institution receiving grant monies is encouraged to implement a program of their own design. At Iliff, this provided an opportunity to utilize and expand existing resources within our *Leadership & Organizational Management* graduate certificate program, while also offering an additional opportunity for students to gain practical training in theologically-based fundraising for churches and non-profit organizations.

Iliff's approach to the project leverages our existing Authentic Engagement™ program,² which provides the research and scholarly basis for a theologically-reflexive, organization-wide process of

- Articulating our shared values rooted in our mission of social justice;
- Developing action plans to reduce debt and increase fundraising at both individual and organizational levels; and
- Providing social support and compassionate accountability, which alleviate shame and stress around issues of debt and finances.

Within the context of the SIFR Initiative, Authentic Engagement is used in designing the overall process of organizational and individual change targeted at fostering resilience through individual and systemic spiritual integration of the moral stress of financial debt.³ This approach to change is utilized in two of the four core SIFR courses, *Authentic Engagement* and *Self-Care: Theological and Psychological Perspectives*.

SIFR SCHOLAR SELECTION CRITERIA

Participants are selected from the incoming class of first-year students, as well as continuing students who are not yet within their final 40 credit hours of coursework.

The Iliff Student Services staff identifies potential participants, who must be:

- Enrolled in Iliff's MDiv degree program, or have already completed an MDiv degree;
- Seriously considering ordination (or already ordained);
- Willing to complete the educational requirements of the SIFR Initiative (see below);
- Motivated to address personal financial circumstances, beliefs, and practices;

¹ The seven United Methodist Theological Schools involved in this project are: Boston University School of Theology, Candler School of Theology (at Emory University), Duke University Divinity School, Iliff School of Theology, Perkins School of Theology (at Southern Methodist University), United Theological Seminary, and Wesley Theological Seminary.

² See Antonio, Arora, Doehring, & Hernandez (2014) for a comprehensive description of Iliff's Authentic Engagement™ program.

³ See Doehring (In press) for a detailed description of this process.

- Willing to make a good faith effort to raise matching scholarship funds; and
- Committed to participation in the research component of the initiative, which may involve online surveys or face-to-face interviews at the beginning and end of each academic year.

The first cohort of nineteen SIFR Scholars entered the program in the fall quarter of 2014. Basic demographic data regarding this group is attached as Addendum A.

RESEARCH ASSESSMENT

Participants in the SIFR Initiative are required to participate in assessments as part of the *Exploring Our Experiences of Student Debt* study. These assessments gather demographic information, test basic financial knowledge, assess awareness of financial indebtedness, and measure personal values, beliefs, and feelings about financial issues related to student loans. Students complete periodic assessment throughout their Iliff career to track trends, reflect changes in knowledge and awareness, and to highlight values, beliefs, and feelings as they emerge within the context of the project. Initial assessments are performed upon each student's entry into the SIFR program; follow-up assessments are performed at the end of each academic year from that point onward. In keeping with the reflective nature of the initiative, both formal and informal conversations during SIFR-related events hosted as part of Gathering Days provide opportunities for identification of new areas to be considered for assessment, and for feedback from participants. At the end of each SIFR Scholar's participation in the program, an exit interview provides an opportunity for additional reflection.

A modified version of this assessment will also be used with students not involved in the SIFR program, trustees, faculty, staff, and denominational partners in order to assess change across the institution.

Basic research results will be made available on a public web page accessible from Iliff's main website (beginning in early 2015). Detailed research results will be offered in future publications and presentations.

EDUCATIONAL COMPONENTS

SIFR Scholars are required to complete four specific courses during their first year in the program. All courses are also available to students in the broader Iliff degree programs. The courses are:

Self Care: Theological and Psychological Perspectives, taught by Dr. Carrie Doehring, Associate Professor of Pastoral Care and Counseling. This four-credit online course introduces students to a process of authentic engagement by beginning with spiritual practices that foster self-compassion, moving students from fear or shame-based lived theologies of stress. Once students become compassionately aware of these lived theologies—emotionally-charged values, beliefs, and coping strategies associated with stress—they become more able to theologically reflect with each other on the intentional theologies they would like to practice in relation to stress. With these circles of compassionate accountability, they experiment with changing the ways they cope with stress at many levels (physical, emotional, relational, vocational, and financial). The course is described more fully in Doehring (2013).

Spiritual Framework for Fundraising. This two-credit course⁴ equips students with practical, theologically-grounded skills related to fundraising and philanthropy in faith communities and non-profits. This online class includes a face-to-face element on campus as part of Iliff's Gathering Days event for Journey students.

Financial Management, taught by Dr. David Carlson, Adjunct Faculty. This two-credit course, offered both face-to-face and online, examines financial concepts for leaders in faith communities, non-profit, and for-profit organizations. Students are introduced to relevant concepts including budget development and management, financial forecasting, cash flow, and debt management.

Authentic Engagement[™], taught by Rev. Tom Barlow, Adjunct Faculty and SIFR Program Director. This online course builds on Iliff's innovative AE program focused on the Self, the Whole, and the Other, and offers students an opportunity to examine the theological and psychosocial foundations of authentic leadership. Students are encouraged to reflect on their own core values and *otherness* as they explore traditional approaches to diversity, trust, and inclusive relationships, and, in turn, how they can build on those reflections to create cultures where people individually and collectively flourish.

COHORT FORMATION AND SUPPORT

SIFR Scholars participate in various cohort activities, both online and, when possible, face-to-face. Utilizing our online Learning Management System, Canvas, cohort members can communicate with each other, ask questions of SIFR staff, and engage a growing set of resources relating to financial management for both individuals and organizations. Online resources accessible through Canvas include potential funding sources, articles, and videos discovered by members of the SIFR Scholar cohort and SIFR staff, as well as resources provided by The Association of Theological Schools, the Lilly Endowment, and other institutions participating in Lilly's *Theological School Initiative to Address Economic Issues Facing Future Ministers*.

Participants are also encouraged to meet face-to-face during Gathering Days events at Iliff, hosted by the SIFR program.

SYSTEMIC ORGANIZATIONAL CHANGE

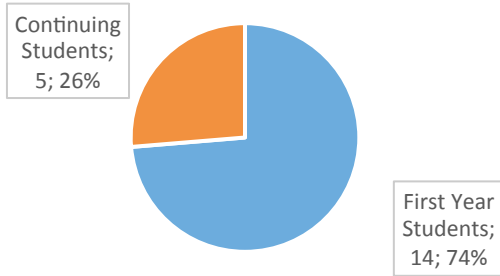
Organizational change is fostered by taking various Iliff constituencies—staff, faculty, trustees, and denominational partners—through a one-day Authentic Engagement program that focuses on the stress of student debt and the ways in which the organization as a whole can offer support. This process of compassionately exploring individual and organizational values and differences related to student debt will conclude with group development of strategies for putting shared values related to student debt into practice. This process has started within Iliff, and will continue to expand into our constituencies during 2015.

⁴ First taught in the Fall quarter of 2014 as a one-credit praxis course, this part of the curriculum is being expanded to two credits, in the hybrid format, for Academic Year 2015-2016.

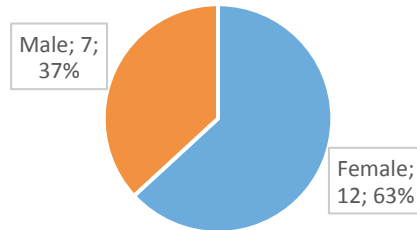
ADDENDUM A: 2014 SIFR COHORT DEMOGRAPHIC DATA

The incoming 2014 SIFR cohort consisted of nineteen students. Information listed below was gathered from Admissions data, as well as self-reported data received during the initial research assessment.

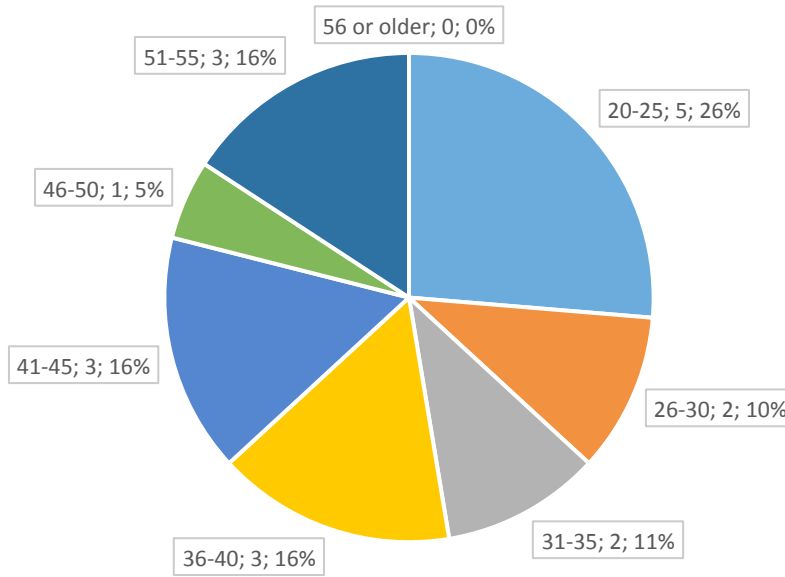
First Year vs. Continuing



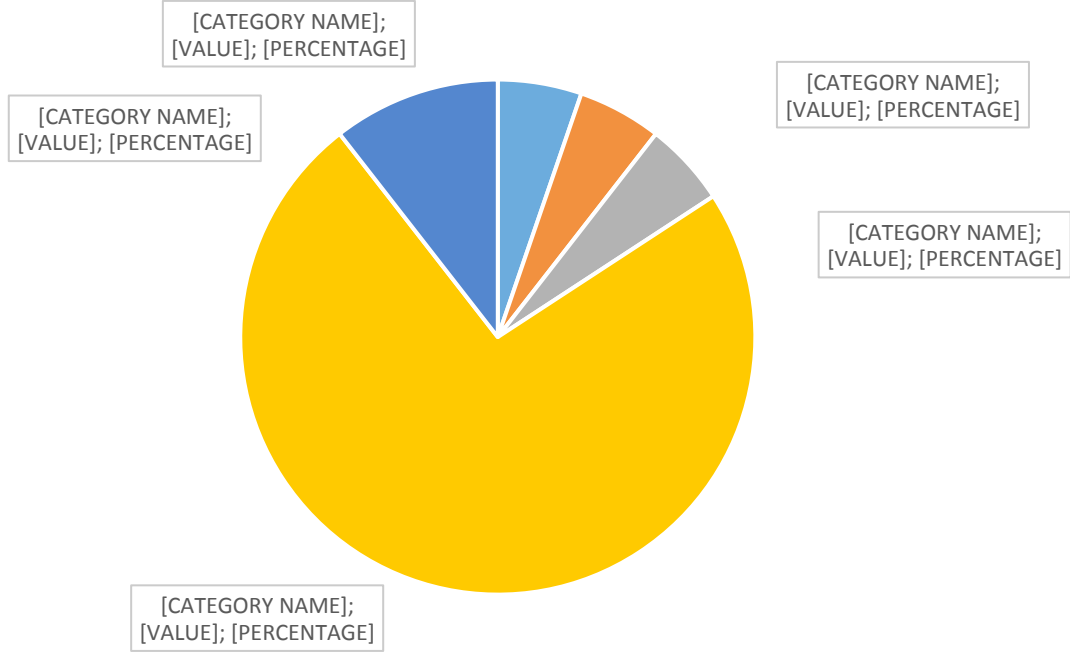
Gender



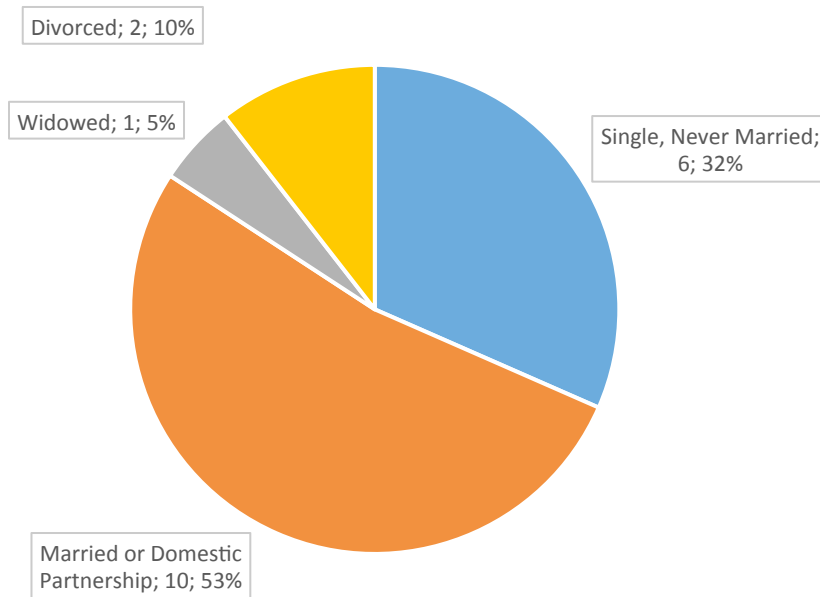
Age



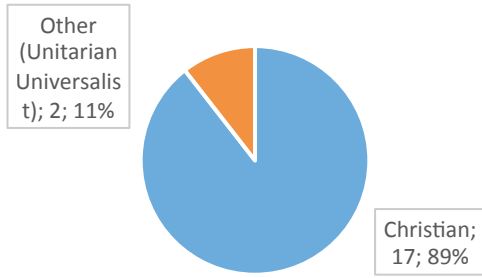
Race/Ethnicity



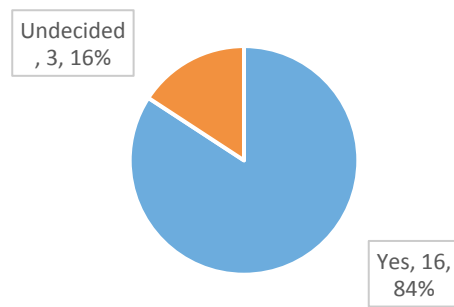
Relational Status



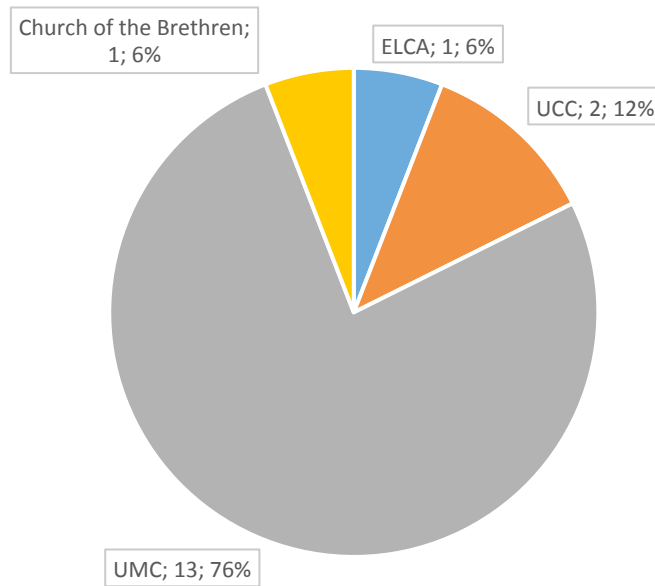
Religious Identity



Planning on Ordination



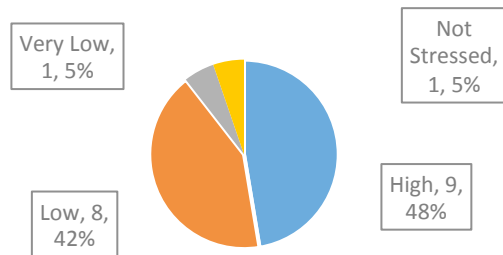
Denominational Affiliation (When Self-Identified as Christian)



Currently Engaged in Ministerial Work



Current Stress Level Related to Educational Debt



REFERENCES

- Antonio, E., Arora, K., Doehring, C., & Hernandez, A. (2014). Theological education and economic revitalization: Creating sustainable organizations through authentic engagement. *Theological Education, 48*(2), 57-67.
- Doehring, C. (2013). New directions for clergy experiencing stress: Connecting spirit and body. *Pastoral Psychology 62*(5), 623-638. doi: 10.1007/s11089-013-0512-1
- Doehring, C. (In press). Resilience as the relational ability to spiritually integrate moral stress. *Pastoral Psychology*.