



Executive Director's Report

Like so much in our lives these days, my report is divided into two sections: The before, and the now. The before was characterized by three major themes: our conversations with strategic partners, evolving international partnerships, and operational advancements.

- **Strategic Partners:** Over the last 18 months, the ACPE Board chair, chair elect, and executive director have met with peer representatives from APC, NACC, and NAJC. Currently, negotiations are primarily between APC and ACPE due to limitations for both NACC and NAJC in considering shared structures. The process feels very open-ended with no clear sense of when we might make decisions, largely due to disruptions from the pandemics.
- **International Partnerships:** The ACPE International Relations Committee has been busily reviewing and evaluating standards of CPE organizations in two countries with more to come. Because travel has been suspended, progress has also been hampered, though we hope to finalize something with Ireland ACPE in coming months. Rod Seeger, Kido Ahn, and Kamal Abu-Shamseih ran an effective unit in Kuala Lumpur, Malaysia just before the pandemic hit, one that may help us learn ways of partnering on similar efforts around the globe.
- **Operational Advancements:** In December 2019, ACPE moved into new office space, saving the association over \$60,000 per year. Of course, we have been primarily working from home, but we hope to get back to the space soon. In August, we will roll out a new database and new website (note: the website is built on the database), including many improvements requested by members. This process began back in December 2019 as well. The office staff want to offer a special word of thanks to ACPE Certified Educator Stuart Harrell for his tremendous support and knowledge in helping us improve the SharePoint system that undergirds our programs.

Of course, now we have the now: the COVID-19 pandemic and the racism pandemic. The majority of the work in both of these areas has been due to the dedication, innovative spirit, and creativity of our members. Thanks to Marc Medwed, John Roch, Tiffany Kindred, and Ruth McPhail Ubaldo from the office staff for their support to the members in these efforts.

- To date, dozens of articles have been published as well as news segments recorded across the US and around the globe, many featuring our certified educators and their efforts to rethink meaningful and effective spiritual care amidst the constraints of the pandemic. Staff have worked with partners at the Chaplaincy Innovation Lab and Transforming Chaplaincy to provide background and help direct media contacts to our members.
- In 2019, the board asked Board Member and Certified Educator Danielle Buhuro to chair a task force to design our 2021 Annual Conference to address anti-bias practice and pedagogies. We had not idea that this group would have to move this conference online at the time, but they continue to make progress in moving this forward.
- Our Advocacy Committee under the leadership of ACPE Certified Educator Jeremy Gilmore and in partnership with the Anti-Bias Task Force, ACPE has made two strong statements in response to the shootings of Ahmaud Aubrey, George Floyd, and Breonna Taylor. That work has led to a series that launches this week, "8:46," eight sessions of 46 minutes each about how to teach in a CPE settings related to these issues, a member-led initiative to address racism and systemic white privilege even within ACPE.

So what about the future?

- As you will hear from ACPE Secretary/Treasurer Linda Wilkerson, ACPE is on good and solid financial footing. We have cash reserves that can carry us for six months before we would need to draw on endowment funds, and the Foundation has largely recovered from a devastating 2nd quarter of 2020. The Board of Directors and Finance Committee are to be commended for their financial stewardship of this incredibly challenging time. In addition, thanks to Tom White, ACPE Foundation Treasurer, and Patrick McCoy, ACPE Foundation Chair, for their leadership during this time as well. You'll hear from Patrick later as well.
- I wish we could see a show of hands of how many educators swore they would never embrace video-based pedagogies, only to now incorporate them fully into their programs because of the limitations of COVID-19. Prior to the pandemic, Marc Medwed was asked by our Department of Education contact to submit paperwork for online recognition, even though such was not yet required. Our paperwork was approved in the summer of 2019, a move that now seems prescient. Due to Department of Education restrictions and the Accreditation Commission's concern about member safety, the decision to suspend site visits in 2020 has led to the development of new methods of reviewing portfolios. Similar efforts have been made by the Certification Commission, and both have raised important questions about how we will use these new practices and new learnings in the future.
- We have many questions: When will we travel again? And what should the association encourage in terms of face-to-face versus online meetings? How many units will run in the fall of 2020? The winter? The following spring? Which of the “pandemic practices” for Accreditation and Certification will continue? What will happen in the US elections, and what will the impact be on the US economy? What comes next for the COVID-19 pandemic? What comes next in our conversations with our Strategic Partners, and what does the membership want from this process?

Thank you for your commitment to ACPE, for your work with students in the challenging moment, and for your support of our team in the office. We look forward to supporting you as we make our way into whatever the future holds.

Respectfully submitted,
Trace Haythorn, Ph.D., Executive Director/CEO



Treasurer's Report to ACPE Membership for 2020 meeting

First, I want to recognize the members of the Finance Committee: David Johnson, Barbara Sheehan, James Egolf, Nan Lung Ling, Jennifer Rochner, Marc Medwed, and Trace Haythorn. We meet regularly to review the financial status of ACPE and to propose an annual budget to the Board of Directors.

Like most of you have experienced, the last few months have been a wild ride for ACPE, and I imagine that we have some rough weather ahead also. I am happy to report that ACPE remains in good financial condition and that we expect to weather the storms. We received a clean audit for 2019 and have managed our expenses well during this period in which our revenue has been down. We also have enough cash on hand to see us through the end of the year without having to dip into reserves.

You have in front of you a 2020 Revised budget that was recently created and will be brought to the Board of Directors for their approval. This budget accounts for the reduced income and reduced expenses necessitated during this pandemic. We believe we will take in approximately 70% of the income in Accreditation fees (the bulk of our income) that we would normally expect and have reduced expenses accordingly. Should revenue exceed these expectations, we will use those funds to reduce the amount of reserve funds we originally budgeted for the creation of our new database.

We will have a better understanding of the impact of the pandemic on registered and completed units of CPE once the summer is over. At that point we may once again revise our budget. We have decided not to draw on Foundation funds if possible so that we can help the Foundation to get back to its pre-pandemic level. You will be hearing a report from Patrick McCoy about the ACPE Foundation, but I can tell you that we are now only about \$200,000 down from where we began on January 1.

In early spring, when we began to realize the impact of this long-lasting pandemic, the Board, at the recommendation of the Finance Committee, voted to suspend all in person ACPE related meetings until at least September 2021, unless the CDC relaxed its recommendations regarding larger in-person meetings. Though this was a tough call because we know how much our members enjoy face-to-face meetings, we also realized that with so much uncertainty, we could not in good conscience enter any meeting contracts with vendors.

As of June 2020, our revenue was \$1,537,479 which was 46% of what was originally budgeted as I said, we expect to get 70% of our originally budgeted revenue. Our expenses were \$1,278,913 which was 38% of what was originally budgeted. We did apply for and receive \$267,000 from the federal Paycheck Protection Program and because we meet the established criteria, we do not believe that we will need to pay any of this money back.

Beginning in January our Accreditation Fee billing process changed to quarterly invoices based on registered student units. We have had a very positive response to the new process and the new invoice format that includes the roster of registered students. As noted in the newsletter, the second quarter invoices will be sent in early August due to the launch of our new database. Thank you for your patience during this year of transition.

We continue to move toward a single student unit rate, and we anticipate reaching this goal in 5 years. For 2021 we will be down to 4 zones with plans to decrease that number each year. To find out your center's rates for the next three years you can contact our finance team at accounting@acpe.edu.

Finally, please pay close attention to **This Week@ACPE** every Monday for updates and reminders about billing. If you are not receiving this communication, please contact [John.Roch](mailto:John.Roch@acpe.edu) in the office so that you will always be up to date.

*Respectfully submitted,
Linda Wilkerson, Treasurer/Secretary*

The Association for Clinical Pastoral Education, Inc.					
Statement of Activity / Revised Budget Proposal					
As of 06/30/2020					
	2020 Budget	2020 Actual	2020 Revised Budget	%	
Revenue					
Accreditation	2,250,000	962,356	1,572,538	70%	
Certification	110,000	85,829	97,048	88%	
Memberships	480,750	372,266	387,266	81%	
Continuing Education	-	2,415	2,415		
Spiritually Integrated Psychotherapy		18,100	18,100		
Dividends	800	14,972	14,972	1872%	
Publications, Lists, Transcripts	3,000	-	-	0%	
Contribution Revenue				-	
AAPC Contribution				-	
Miscellaneous Income	29,298	1,979	1,979	7%	
Advertising	40,000	23,691	40,000	100%	
Conferences and Meetings Revenue	107,400	23,890	23,890	22%	
FCPE Operating grant	150,000	-	-	0%	
Grant Income		500	500		
Contract Income	-	31,481	55,224		
PNC-PPP Loan Proceeds			267,700		
Withdrawals from reserves	158,000	-	153,000	97%	
Total Revenue	\$ 3,329,248	1,537,479	2,634,632	79%	
Expenditures					
Travel Expenses	639,700	96,244	96,244	15%	
Conferences and Meetings	304,400	57,290	62,290	20%	
Stipend	-	11,938	11,938		
Occupancy Expense	128,200	50,203	128,200	100%	
Taxes, Licenses, Permits	750	2,675	2,675	357%	
Depreciation and Amortization	86,000	37,681	86,000	100%	
Insurance Expense	39,000	17,182	39,000	100%	
ED-Discretionary Fund	4,000		-	0%	
Staff Expenses	1,491,890	662,416	1,491,890	100%	
Research Expenses		65,671	65,671		
Office Expenses	76,000	24,142	43,642	57%	
Technology	297,158	104,431	357,158	120%	
Professional Services	180,000	109,861	180,000	100%	
Bank and Credit Card Fees	50,000	22,752	47,847	96%	
Bad Debt Expense	1,500	-	1,500	100%	
Interest Expense	1,000	-	-	0%	
JPCP Assessment	6,500	6,500	6,500	100%	
Reflective Practice	5,700	5,785	5,785	101%	
Dues, Subscriptions	15,000	4,100	7,000	47%	
COMISS	1,250	-	1,250	100%	
Pastoral Concerns	1,200	42	42	3%	
Total Expenditures	\$ 3,329,248	1,278,913	2,634,632	79%	
Net Operating Revenue	-	258,566	(0)		



Foundation Endowment & Investment Portfolio

It will not come as a surprise that the value of endowed funds declined significantly in the spring of this year owing in large part to the fluctuations related to the COVID 19 pandemic's effects on the global economy. U.S. stock market values were also influenced negatively by an oil price war between Saudi Arabia and Russia, but this was not a big factor for ACPE because we do not hold much in the way of oil industry stocks. The year began with a high account value of \$5,927,815, an increase of nearly \$2,000,000 over January 2019. By the end of March, we had experienced a decline to a low of \$4,587,429. April and May saw some recovery, arriving at a valuation of \$5,643,049 by June 30. Though there is some relief in seeing the value of our endowment recovering, the uncontrolled spread of the novel coronavirus in many parts of the country with the resulting disruptions in employment and economic activity points toward continued market volatility and downside risk. The effect on the value of our portfolio over the next 12-24 months is uncertain, but it is clear that we cannot count on a smooth upward curve.

For the past several years, the Foundation Board has maintained a strategy adapted to the longstanding volatility in markets to assure the endowment can provide the leveling and sustaining influence sought by the ACPE Board. With the experienced and wise counsel of our Treasurer, Mr. Tom White, we have maintained a strong position in income generating securities with an emphasis on quality and an avoidance of the severe downsides that can result from more aggressive, growth-oriented investment decisions. Additionally, recognizing the high risks of volatile periods, we have maintained about \$500,000 as a reserve of cash rather than re-investing proceeds as might be done in more stable times. This has contributed to the Foundation's ability to assure that we will be able to provide the level of funding that the ACPE Board's budgeting process has been counting on for 2020 irrespective of the short term performance on Wall Street.

Fundraising Activities

- To date, \$30,000 of our \$100,000 goal has been raised. We have appreciated Brooks Heard's leadership as the 2020 Annual Campaign Chair. This is a vital leadership role for a program that demonstrates that we as ACPE members believe and invest in the future of our shared work. This year's focus is the goal of adding 20 new monthly donors. We are a quarter of the way to that goal.
- *#GivingTuesdayNow* was a success! We exceeded our \$5,000 goal, and raised \$7,100, plus an additional gift of stock from 65 donors. We will use this money to enhance the funding available for Innovative Program Awards.
- *Grants*: ACPE continues to partner with the Chaplaincy Innovation Lab, the George Washington Institute of Spiritual Health (GWish), and Transforming Chaplaincy on grant projects that advance the spiritual care and education field. ACPE is a partner recipient on active grants from the Henry Luce Foundation, Arthur Vining Davis Foundations, and the Templeton Foundation.
- *Planned Giving*: Generous and thoughtful donors ensure ACPE remains the gold standard in spiritual care and education for generations to come! invite you to contact ACPE Development Specialist, Jasmine Okafor, to learn how you can also leave an impactful legacy to ACPE.

Boisen Scholars Program

Thanks to the support of our generous donors, six students were selected as the 2020 cohort of **Boisen Scholars**. Awards were granted to Sakinah Alhabshi, Krisha Arvin, Quanita Hailey, Jeremiah Page, Enver Rahmanov, and Lauri Swann.

The Boisen Scholars Program supports the ACPE strategic objective of increasing the number of educators by supporting opportunities for CECs and students who might consider CE training to engage with the activities and members of ACPE outside their own circles. Support typically includes a complimentary registration fee and travel funds to attend the

ACPE Annual Conference. This year attracted 85 applicants and the selection committee devoted impressive energy, time, and dedication to identifying selection criteria and making choices. The committee thoughtfully placed diversity high in its selection criteria, looking to promote the engagement of new voices and manifold communities in ACPE's mission. This year's selection committee included: Brenda Simonds, Stephen Goss, Shulamit Izen, Mishca Smith, Brooks Heard, Behike Lisa Nyabinghi, with staff support provided by Katherine Higgins, Jasmine Okafor, and Tiffany Kindred.

The cancellation of the annual meeting presented two challenges for the Boisen Scholars Program: first, how to follow through with the intentions of the award and the donors who support it with no conference to attend, and second, how to fund continuation of the opportunity in the absence of the usual fund-raising opportunity. After consultation with the committee and consideration of the options, the Foundation Board determined that it was important to follow through with realizing the recognition of the 2020 awardees and apply the available resources to their respective professional development paths. To this end, the 2020 Boisen Scholars were offered the \$400 scholarship to be applied toward another professional development opportunity within the field of spiritual care and education.

Foundation Research Grants Update

In November 2019, the Foundation convened a Research Grants Committee to explore funding opportunities that support the priorities and objectives of the ACPE Research Committee. Members include: George Grant (chair), David Carl, Helen McNeal, and Linda Wilkerson, with staff support provided by Jasmine Okafor and Michael Skaggs (Chaplaincy Innovation Lab). The committee considered a proposal request from the ACPE Research Committee and Research CoP to conduct a multi-site study on the relationship between Emotional Intelligence and CPE. The Foundation Research Grants Committee has taken a pause from exploring funding, as we are waiting to see how our portfolio fares because of the Covid-19 pandemic. We continue to remain in communication with the Research Committee as the project develops.

Innovative Program Awards Update

Given the Covid-19 pandemic, the Innovative Program Awards Committee decided to shift this year's funding focus to a) how we might sustain ACPE programs negatively impacted by the pandemic, or b) how we might use the funds to incubate innovative ideas that would be of benefit to the wider association. The committee decided to hold off on creating specific criteria until we learn more about what ACPE members need to help navigate the pandemic. The Foundation board also decided to allocate up to \$7,100 raised from #GivingTuesdayNow towards the 2020 Innovative Program Awards budget, which would total \$22,100 in available funding.

MAP Fund Update

The MAP Fund Committee, chaired by David Carl, will meet within the next few weeks to determine their 2020 process. The committee will pay attention to potential mental health complications resulting from the pandemic, as this awareness might influence any guidelines the committee might consider.

ACPE Service Awards

Though the major responsibilities of the Foundation lie in tending to ACPE's financial resources, we have in recent years been asked by the ACPE Board to assume responsibility for another kind of stewardship activity, namely the recognition of outstanding leadership contributions. Former ACPE President and Foundation for ACPE Board member Sally Schwab chairs the committee that developed a process for identifying candidates and selecting recipients of ACPE's Service Awards, and continues to manage the important function of honoring exceptional service to the organization and its mission. 2020 ACPE Service Award recipients will be recognized through video presentations and other multi-media activities during #ACPEproud week, August 3-7, 2020.

Conclusion

Finally, I wish to encourage all ACPE members to continue your support of ACPE through your contributions to the Foundation's Annual Campaign. Additionally, purchase of ACPE merchandise in celebration of #ACPEproud week is a way to target support especially toward encouragement of the next generation of ACPE educators and spiritual care practitioners. Proceeds from the sales will go to the Foundation in support of the Boisen Scholars Program and Innovative Program Awards and give us all that much more to be proud of.

Our once fledgling fundraising function has developed into an intentional and multi-faceted program owing to the vision of the Foundation's previous leaders, the wise guidance of its board members, the diligent shepherding of Trace Haythorn and Jasmine Okafor, and commitment and generosity of ACPE's donors. Thanks to all of you for continuing to build the Foundation as a resource to nurture the future of Clinical Pastoral Education and spiritual care practice.

Respectfully submitted,
J. Patrick McCoy, Chair, Foundation for ACPE

2019 Giving at a Glance...

Because of you, ACPE celebrates:

- A total of \$85,320 raised by 300 ACPE members and friends to support our holy work.
- \$16,400 raised on Giving Tuesday from 100 ACPE members, friends and staff to support professional development opportunities for ACPE students and innovative research projects.
- ACPE, in partnership with the George Washington Institute of Spiritual Health, received funding from the Arthur Vining Davis Foundations for the "Building Collaborative Partnership Between Interfaith Leaders and Clinicians: Advancing Interprofessional Spiritual Care in Palliative Care" project.
- ACPE continues to partner with the Chaplaincy Innovation Lab and Transforming Chaplaincy on projects that advance chaplaincy education in theological schools, and share the effectiveness of chaplaincy in healthcare contexts.
- ACPE members and friends donated over 50 pairs of socks, sweatshirts, and belts to El Refugio, an ecumenical nonprofit organization that provides hospitality to the men (and their visiting families) detained at Stewart Detention Center in Lumpkin, GA. Stewart Detention Center is one of the largest U.S. Immigration & Customs Enforcement (ICE) facilities in the United States.



ACPE Staff with representatives from El Refugio on Giving Tuesday.

2019 Innovative Program Awards

Funded by 20% of the amount raised from the *Sowing Seeds for Our Holy Work* Annual Campaign, Innovative Program Awards support projects that allow ACPE to develop new and experimental programs extending CPE into atypical settings, and test new pastoral theology, education or spiritual care concepts and methodologies. **\$18,000 was awarded in funding.** Congratulations to the 2019 Innovative Program Award recipients!

Ziyara Muslim Spiritual Care: "Developing a Spiritually-Fulfilled Global Society"

With the help of a \$9,000 Innovative Program Award from the Foundation for ACPE, and after two years of groundwork, CPE will be offered for the first time in Malaysia! Ziyara Muslim Spiritual Care will launch its first ACPE-accredited spiritual care pilot program with space for twelve students who will earn a half-unit of ACPE CPE. At present, Malaysia lacks opportunities for formal training to prepare religious/spiritual leaders to deliver spiritual care for patients and their caregivers. ACPE Certified Educator Rev. Rod Seeger will join Dr. Kamal Abu-Shamsiehm, founder of Ziyara Spiritual Care and Director of the Inter-Religious Chaplaincy program at the Graduate Theological Union, Berkley, CA to lead this program.

John Hopkins Health System: "Caring for the Peacemakers: Curriculum and Program Efficacy of a Unit of CPE with the Baltimore Police Department"

The Foundation for ACPE granted \$9,000 to John Hopkins Health System to continue the work from their 2017 project, by making the pilot "Caring for the Peacemakers" curriculum available for ACPE and other in educational settings. Led by ACPE Educators Paula Teague and Christopher Brown, this project designed a special CPE unit where Community Chaplains engage in CPE in order to make Baltimore a better place to live, work and thrive. Participants in this program use CPE to offer spiritual care to police officers through ride-alongs, provide spiritual care in the community as police officers engage the community, and provide spiritual care in local congregations.

Get an interactive view of our innovative programs by scanning this QR code with your phone.



Your Gifts at Work:

Hebrew SeniorLife: "TI—CPE: Trauma-Informed Clinical Pastoral Education"



Pictured is an art installation outside of the Tree of Life Synagogue supported by CPE participants.

In 2019, your gifts provided trauma-informed spiritual care education for rabbis and Jewish professionals present at the aftermath of the anti-Semitic Pittsburgh synagogue shooting. The lessons from this first of its kind trauma-informed CPE unit will be made available to others in the ACPE community, as well as used to improve the patient experience for survivors of trauma at Hebrew Senior Life.

Social Justice CPE: "CPE Inside the Walls"



Pictured are the students in the "CPE Inside the Walls" unit, with ACPE Certified Educator Sue Allers-Hatlie (far left), and The Minnesota Correctional Facility at Stillwater Chaplain Marty Shanahan and Warden Guy Bosch.

In 2019, your gifts provided a unit of CPE with a cohort of community clergy and incarcerated spiritual leaders at the Minnesota Correctional Facility at Stillwater. This project was led by ACPE Certified Educator Sue Allers-Hatlie.

CareFirst NY: "CPE Center at CareFirst NY, Inc. in the Southern Tier of New York"

In 2019, your gifts expanded spiritual care in a hospice and palliative care setting to an underserved, rural community in the Southern Tier of New York state. CPE had never been offered there before.



Pictured is the first cohort of CPE students at their graduation service.