

# AN EFFECTIVENESS STRATEGY FOR THE ROCKY MOUNTAIN CONFERENCE

## INTRODUCTION

### History

John Wesley, the founder of Methodism, described the church's primary function as *spreading scriptural holiness*. For Wesley, scriptural holiness was a combination of personal and social holiness - to experience for one's self and invite others to experience the grace of God through Jesus Christ and, as grace filled people, influence society to be just and merciful. Methodism was and continues to be a movement in which an abiding, personal faith in Christ leads directly and necessarily to the outward ministry of making disciples for Jesus Christ for the transformation of the world. For Wesley, this was a personal life changing encounter that moved people into the world to serve the least, the last and the lost. Wesley's thinking was based on the example of Jesus.

Wesley utilized an itinerant (appointive) system for assigning pastors. It was a missional system for the purpose of spreading scriptural holiness. The goal was to identify and deploy as many pastors as possible to grow disciples, grow congregations and start new congregations. It was very effective, particularly in America where the population was growing and mobile. The system originally paid all clergy the same salary, \$100 a year. Pastors usually served a circuit - a number of churches in a defined area. Pastors traveled from church to church to share the Good News. The system depended on the laity to form and lead weekly class meetings (small groups) where disciples worshiped, fellowshiped, studied, served and witnessed to keep the Methodist movement growing. This was the laity's role in the first century as well, as recorded throughout the book of Acts and other New Testament Letters.

In the early years of Methodism, the itinerant system moved pastors, usually within the first year and certainly by the second year, to a new circuit. Lay leadership was the stabilizing force that kept the church growing and changing as the population grew and evolved. Often, class meetings were organized and a congregation started before a pastor was assigned. As the population began to settle and reside in a particular area, towns were established. Pastors also *settled*, which changed the dynamics of pastoral tenure, pay, and responsibilities. Pastors began to stay in an appointment longer, were paid more, assumed responsibility to organize small groups, lead studies, evangelize, and provide care for the sick, while the laity began to relinquish much of their ministry. This is about the same time that the Methodist Church, which had been the fastest growing denomination, began to level off in its growth. It is also the time that the denomination became heavily involved in institution building. By the early 1900's, a little more than 100 years after the denomination started, the character and mission of the church changed from an evangelistic and social action movement to one of institution building.

While short tenure appointments served the church well in the early part of Methodism, today's experience indicates that short-term appointments lead to stagnation and decline. Congregations with pastoral appointments of seven or more years in which laity are

called, equipped, sent, and supported to do the ministry as the early Methodist laity did, are growing disciples and congregations.

There are many issues facing the itinerant system today: matching churches and pastors so that the partnership produces fruit, rising housing and benefit costs, salary needs, and the wide range of types and styles of congregations. The appointment system will continue to emerge and evolve as a system to address the changing needs of congregations and pastors. Through these changes, the system's goal is to be a dynamic vehicle for making disciples of Jesus Christ. The Rocky Mountain Conference is blessed with Spirit-filled pastors and laity who, through the appointment system, will capture the evangelistic and social action fervor of John Wesley.

**The Book of Discipline of the United Methodist Church 2004 states:**

The purpose of the annual conference is to make disciples for Jesus Christ by equipping its local churches for ministry and by providing a connection for ministry beyond the local church, all to the glory of God. (§601)

The local church provides the most significant arena through which disciple-making occurs. It is a community of true believers under the Lordship of Christ. It is the redemptive fellowship in which the Word of God is preached by persons divinely called and the sacraments are duly administered according to Christ's own appointment. Under the discipline of the Holy Spirit, the church exists for the maintenance of worship, the edification of believers, and the redemption of the world. (§201)

The church of Jesus Christ exists in and for the world. It is primarily at the level of the local church that the church encounters the world. The local church is a strategic base from which Christians move out to the structures of society. The function of the local church, under the guidance of the Holy Spirit, is to help people accept and confess Jesus Christ as Lord and Savior and to live their daily lives in light of their relationship with God. Therefore, the local church is to minister to persons in the community where the church is located, to provide appropriate training and nurture to all, to cooperate in ministry with other local churches, to defend God's creation and live as an ecologically responsible community, and to participate in the worldwide mission of the church. These responsibilities are minimal expectations of an authentic church. (§202)

**The mission of the Rocky Mountain Conference states:**

The mission of the RMC of the UMC is to participate in growing and sustaining local churches and spiritual communities as they attempt to fulfill their calling as Christians and United Methodists in the world.

**Rocky Mountain Conference Assumptions**

The Rocky Mountain Conference works toward these purposes by providing effective spiritual leaders to local congregations. As a Conference, we assume that every clergy is a follower of and learner from Jesus Christ and wants to be effective in ministry, and that every local church wants to be healthy and growing and have an effective witness for the Gospel.

However, clergy and congregations are not all alike. Each congregation has distinctive needs, characteristics, and opportunities for mission. Each clergy has unique gifts and graces, professional experiences and expectations, family needs and concerns.

The role of clergy is a unique leadership role; it is not the same as that of CEO, therapeutic counselor, or motivational speaker, although it shares some aspects with each. The clergy is called to share life in a geographic community and a community of faith, modeling a life lived in relationship with God, sharing the love of Christ, and communicating the connection between the practical realities of the world and the theological realities of the Spirit.

The church, a congregation, is not a corporation but a body; it is Christ's presence still on earth. As such, healthy, vital, effective congregations become, as Teresa of Avila so simply put it, God's physical hands, feet, voice, and heart in this world.

Effectiveness of spiritual leadership has its foundations in biblical values and in an intimate relationship with God. In Micah 6:8 we read, "What does the Lord require of you but to do justice, and to love kindness, and to walk humbly with your God?" And when Jesus was asked which is the greatest of the commandments, he responded, "The first is, 'Hear, O Israel: the Lord our God, the Lord is one; you shall love the Lord your God with all your heart, and with all your soul, and with all your mind, and with all your strength.' The second is this, 'You shall love your neighbor as yourself.' There is no other commandment greater than these." (Mark 12:29-31)

## **COMPONENTS OF EFFECTIVENESS FOR CLERGY (Elders, Deacons, Local Pastors)**

A clear, concise articulation of effectiveness is elusive because effectiveness can take different forms in our varieties of contexts. There are also seasons of effectiveness; even effective clergy can have a season of ineffectiveness due to life and ministry situations. Effectiveness is also a shared responsibility between clergy and congregation. However, to be faithful to the guidelines of The Discipline, this document is an attempt to clarify effectiveness in ministry.

Therefore, in accord with ¶331 of The Discipline, the Rocky Mountain Conference affirms the following components of effectiveness, realizing that no one person will attain precision in all areas.

### 1. Leadership

- Articulating God's vision for the congregation
- Offering clear communication orally and in writing
- Providing reflection on how faith applies to life and community issues
- Modeling a lifestyle of integrity to the call of Christ
- Empowering people for ministry within the church community and beyond
- Initiating opportunities to explore and respond to faith
- Helping people find their own faith story
- Showing sensitivity to others who present either different or opposing opinions or concerns
- Setting a spiritual context for the administration of the church; recruiting, planning, training, organizing, financing
- Facilitating dialogue among persons when tensions are present
- Challenging the congregation to grow in their understanding of stewardship by framing it theologically and grounding it in our faith story
- Educating the congregation to fulfill their Wider Mission tithing commitment
- Modeling life-long learning
- Paying attention to family, as well as spiritual and personal health
- Inviting individuals to consider a call to ministry

### 2. Community

- Participating with other United Methodism congregations in ministry
- Developing networks of support and accountability
- Maintaining a place where spiritual friendships develop
- Providing safe places to explore faith and engage in dialogue
- Valuing diversity and working toward racial and ethnic inclusiveness
- Offering hospitality and ministry toward persons in every season of life, every cultural background, every degree of physical and mental capability and every sexual orientation

- Connecting the needs of contemporary people with the rich heritage of past generations of faith
- Leading the congregation in evangelistic outreach so that others might come to know Christ
- Participating in neighborhood, community, ecumenical, and interfaith concerns so as to lead the congregation to be involved beyond the local church
- Sharing life through food, fellowship, playfulness, and interests

### 3. Spirituality

- Participating in spiritual formation of the congregation
- Modeling life as a disciple of Jesus Christ
- Offering strategies, programs, and opportunities for spiritual formation and growth for individuals and the community
- Nurturing a connection with the divine that permeates every part of life
- Exploring dynamics of meaningful corporate worship and the rituals that mark the passages of life
- Offering pastoral care (counseling, visitation, grief work)
- Providing means of grace: worship, study, prayer, silence, simplicity

### 4. Transformation

- Creating a climate of expectation of growth in faith
- Inviting individuals to take intentional steps in discipleship
- Helping communities identify growth areas and address them
- Doing theological reflection – moving from knowing about faith to applying faith to life
- Bringing the voice of the church to the social issues that shape culture
- Moving outside your comfort zone
- Being agents of change
- Offering God to the world
- Using dialogue as a tool for bringing persons from various points of view to a common table

### 5. Service

- Reaching beyond the community of faith
- Sharing resources with those outside the community of faith
- Empowering gifts of individuals for addressing the needs of others
- Equipping individuals and the congregation to find their ministry and to pursue it
- Addressing the needs of the community and world
- Putting faith into action

## **Measuring and Resourcing Effectiveness**

The purpose of measuring and resourcing effectiveness is growth and development of both individual clergy and congregations so that all might work together to be formed as disciples of Jesus Christ and to offer the path of faith to others.

These are the resources for sustaining effectiveness in the Rocky Mountain Conference:

1. Peer accountability through discernment groups and/or cluster gatherings
2. Use of preventative and proactive aspects of Conference Health Plan, including counseling and pastoral consultant line through United Behavioral Health
3. Quadrennial ethical training (Creating Sanctuary)
4. Appointment exit interviews - attached (conducted between the exiting pastor, S/PPRC chair or representative, and the district superintendent)
5. Transition check list - attached (a consistent file of information for the incoming clergy from the outgoing clergy)
6. Vacation, study leave, and sabbatical (see Section 2.II.C of the conference rules and ¶349 and 350 in The Discipline)
7. Participation in RMC functions – Annual Conference, District Conference, Orders Event
8. Having and being a mentor

These are the tools for measuring effectiveness in the Rocky Mountain Conference:

1. Yearly S/PPRC evaluation of the clergy and congregation (attached)
2. Yearly supervisory meeting of the clergy and district superintendent (attached)

## COMPONENTS OF EFFECTIVENESS FOR CONGREGATIONS

A clear, concise articulation of health and effectiveness of congregations is elusive because they can take different forms in our variety of contexts. Effectiveness is also a shared responsibility between clergy and congregation. However, to be faithful to the guidelines of The Discipline, this document is an attempt to clarify expectations for effective ministry by the congregation.

Therefore, the Rocky Mountain Conference affirms the following components of congregational effectiveness, realizing that vitality in all areas is difficult to attain.

### 1. Worship

There are many valid worship experiences. Each congregation must be intentional about identifying the worship experiences it can offer. This assessment should take into account not just what makes the established parishioners comfortable but also what aspects of worship encourage the visitors to feel part of the sacred experience and what aspects of worship invite all persons into a genuine faith journey. The following questions may help clarify this assessment:

- Is there as clear sense of passion?
- Is the worship genuinely inspiring for both the established member and the new member/visitor?
- Is there an openness to both continuity and innovation in the worship experience?
- Is the congregation invited into prayer?
- Does worship engage the heart, mind, soul, and strength of the people?
- Does worship give a sense of joy and hope?
- Do worshippers meet God?
- Are there teams of laity that participate in worship planning and leadership from a variety of levels: liturgy, chancel care and decoration, seasonal planning, etc.?
- Has there been an increase in worship attendance this year?

### 2. Nurture/Education

A healthy church encourages believers to grow in their relationship with God and with one another in the context of a safe, affirming environment. A mature, wisdom-based Christian faith is not simply a confession of faith. It is a life long journey of a deepening relationship with God, with Jesus Christ, with the Holy Spirit. A healthy church provides training, models, and resources for members of all ages to develop spiritual disciplines and to participate in spiritual formation.

A healthy church is a covenant community where the various members of the Body are nurtured into knowing that they are loved by God and are called to live at their fullest capacity. It is intentional in its efforts to build loving, caring relationships with families, between members, and within the community they serve. The following questions may help clarify this assessment:

- How are members and friends growing in their ability to articulate their faith?
- What experiences/classes are being offered for all ages (Bible study, small group discussions, contemporary issues)?
- Are there teams of laity that participate in the nurturing ministry from a variety of levels: prayer tree, phone calls, home visitation, hospital calls, care giving?
- Is there an effective system for tracking the needs of parishioners?
- Are people supported throughout the life cycle?
- Are at least 80% of the worshipers engaged in ministry?

### 3. Service

A healthy church places a high priority on demonstrating the love of Christ to those outside the church. Any vital church will always be looking beyond and outside of itself. The following questions may help clarify this assessment:

- Does the congregation identify itself as a mission-oriented church?
- Are there activities in which volunteers can participate?
- Does the church have mission trips?
- Does the congregation have a clear understanding of mission and outreach?
- Are parishioners prepared to experience Christ when they participate in various projects?
- Can the congregation approach controversial outreach and have a way to actively listen to one another?
- Is the church financially supporting mission through locally identified community projects as well as world mission projects?

### 4. Evangelism

Evangelism is the work of the congregation; sharing the transforming love of God that we know through Jesus Christ with others. First and foremost, one's behavior and temperament needs as much as possible to be consistent with one's faith. Believers then reach out to others to share their life and stories of faith. The following questions may help clarify this assessment:

- Does the congregation have ways to talk about and to train parishioners in witnessing to their faith?
- Is the congregation engaged in acts of hospitality, receiving and honoring the visitor/stranger? "Open hearts. Open minds. Open doors."
- Has the congregation received people by profession or reaffirmation of faith this year?

## 5. Stewardship

Stewardship is an important spiritual aspect of a congregation's ministry. It includes financial tasks such as budget building and reporting, as well as helping the congregation grow in their understanding of how generosity affects one's spiritual life. Stewardship also includes the use of time and talents. The following questions may help clarify this assessment:

- Is the congregation open to talking about stewardship of money and service?
- Does the congregation tie its budget planning to its vision?
- Do leaders in the church encourage a spirit of giving?
- Are members being taught that they are stewards of their God-given resources and challenged to sacrificial generosity in sharing with others?
- Did the church reach 100% of its wider mission tithe last year?

## 6. Administration

Administration is the structure of the congregation that enables the ministry of the church to work. It is like the skeleton of the body. It needs to be strong yet flexible. When the skeleton works well, it is hardly noticed and takes little effort to move. Administration ensures that there is a vision and common goals for the body thereby ensuring that the body is moving in the same direction. The following questions may help clarify this assessment:

- Is the creative energy of the congregation going towards worship, education, and mission (the outward signs of ministry) rather than being consumed with administration?
- Is there an effort to continually train an emerging group of new leaders within the church?
- Is there has a healthy collaborative process to analyze and resolve conflicts?
- Is there a team of lay people trained in conflict management, who are available for conflict resolution and mediation when conflict arises in the church or between members?
- Is the trust level high?

## **Measuring and Resourcing Effectiveness**

The purpose of measuring and resourcing effectiveness is growth and development of the congregation so that all might be formed as disciples of Jesus Christ and offer the path of faith to others.

These are the resources for sustaining effectiveness in the Rocky Mountain Conference:

1. Workshops and training events offered by the District and Conference
2. Yearly Church Conference
3. Quadrennial ethical training (Creating Sanctuary)
4. Appointment exit interviews - attached (conducted between the exiting pastor, S/PPRC chair or representative, and district superintendent)
5. Transition check list - attached (a consistent file of information for the incoming clergy from the outgoing clergy)

The tool offered for measurement in the Rocky Mountain Conference is the yearly congregational evaluation completed by the church leadership (attached).

## INTRODUCTION TO EVALUATION PROCEESS FOR CLERGY AND CONGREGATIONS OF THE ROCKY MOUNTAIN CONFERENCE

Evaluations are often viewed as a test to assign a grade. This evaluation is not a test but an opportunity to:

- Identify and build on strengths that will further enhance discipleship in the congregation and the community.
- Identify behaviors or attitudes that are detrimental to building discipleship in the congregation and the community.
- Affirm the gifts and graces of the pastor/deacon and congregation.
- Clarify expectations.
- Identify areas limiting discipleship growth and development.
- Set priorities for ministry.

There are three parts to the evaluation:

1. Congregation's evaluation of its own mission and ministry to be completed by the team of: clergy, church council chairperson, S/PPRC chairperson, and the lay leader. Additional laity may also be added to insure gender, race and age (youth and young adult) inclusiveness;
2. Clergy self-evaluation to be completed by each clergy serving the congregation;
3. Clergy evaluation to be completed by the S/PPRC.

***The congregational evaluation is to be completed once every three years. The clergy evaluations are to be completed each year. All three evaluations are to be filed with the district superintendent, the church's personnel files, and the S/PPRC by May 1.***

Good planning and thoughtful participation by everyone involved in the process will result in clear expectations and a fruitful outcome. Seeing the evaluation in its three different parts will help the evaluation process go smoothly. Each person/group has only a few pages to complete, and the forms are designed for completion on the computer (the form may be downloaded from the web site, [www.rmcm.org](http://www.rmcm.org)). The computer-attached document will expand if necessary as you type it. If you do not have access to a computer, use a printed document and use the reverse side of the page to add additional comments.

In the box that follows is a *sample* timeline for completing this process. This plan may be modified to adapt to a congregation's needs and style as long as the following are completed:

- The district superintendent receives the completed evaluation on or before May 1;
- The clergy has had the opportunity to review and dialogue with the S/PPRC about the evaluations.

As you work on the evaluation, you are encouraged to:

- Begin with prayer to discern the Holy Spirit's guidance;
- Focus on the entirety of a clergy's ministry in a given year, not on isolated events or activities;

- Focus on professional and ministry concerns and not personal issues;
- Be honest with yourself and the person you are evaluating;
- Identify specific examples and actions that illustrate positive ministry or areas to be improved by the clergy or congregation;
- Identify concrete action steps that will lead to a better future rather than vague desires or activities that will not generate growth and development.

The following is a planning guideline to assist you in completing the evaluation.

**Part one** (date: ) – Together, the lead clergy and S/PPRC chairperson set the dates for the evaluation process. A copy of the entire evaluation is sent by e-mail or regular mail to the S/PPRC, church council chairperson, the lay leader and any other clergy serving the church, inviting them to read through the document and begin to pray that God will use this as an opportunity to strengthen the congregation’s discipleship ministry. *There is a sample letter at the end of this evaluation.*

**Part two** (date: ) – The clergy serving the church complete Part I of the evaluation, *Pastor/Deacon Self Evaluation*.

**Part three** (date: ) – The lead clergy, church council chairperson, S/PPRC chairperson, lay leader and other clergy as appropriate meet to complete Part II, *The Congregation’s Evaluation*.

**Part four** (date: ) – The S/PPRC are sent Part III, *The Clergy Evaluation* for each to complete individually. All of the other completed evaluations are also mailed to the S/PPRC in preparation for meeting(s) during week five. The S/PPRC Chair receives and collates responses.

**Part five** (date: ) – The S/PPRC meets to reach agreement on *The Clergy Evaluation* and to present it to the clergy. The S/PPRC will also review *The Congregation’s Evaluation*, modify it through discussion, discuss the evaluation with the clergy, and reach agreement on the final evaluations to be submitted.

**Part six** (date: ) – The completed evaluations are to be e-mailed to the district superintendent and placed in the church personnel and the S/PPRC files.

*Sample letter to send to everyone participating in the evaluation process. It should come from the pastor and S/PPRC chairperson.*

Dear Evaluation Team,

We enter an important season within the life of our congregation as we evaluate our congregation's and clergy's discipleship ministry. The material attached is a process to help us. This will be a valuable experience for us as we:

- Pray for the Holy Spirit's guidance;
- Openly and honestly respond to the questions;
- Maintain confidentiality about discussions with our clergy;
- Answer not only for ourselves but the children, youth, young adults and adults of our congregation;
- Read through all of the material before completing the evaluation;
- Recognize the numerical rating system not as a grade but an opportunity to clarify effectiveness.

This opens the door to clarify expectations and develop a strong healthy working relationship.

We look forward to working with you in this process to glorify God and strengthen our ministry. The following meetings have been set for our evaluation process.

*Insert meetings, who is to attend, time and location*

In Christ,

**PART I – CONGREGATION’S EVALUATION**  
*An Evaluation of the Congregation’s Discipleship Ministry*  
**To Be Completed by Leadership**

This evaluation is to be completed in its entirety once every three years. During the intervening years, the Administrative/Church Council is to revisit strengths, skills to be improved, and actions and continue to work on these areas for further transformation of the congregation.

Part I is to evaluate the congregation’s progress in making disciples of Jesus Christ for the transformation of the world. It is to be completed by the team consisting of clergy, S/PPRC chairperson, church council chairperson and lay leader. Additional laity may also be added to insure gender, race and age inclusiveness.

The team is to share their evaluation with the S/PPRC for clarification. A synopsis of the evaluation is to be reported to the church council and the congregation by the church council chairperson so that the congregation is affirmed in their strengths and learns about the areas for growth.

Church:  
Lead Clergy:  
City/Town:

Date:  
District:  
Zip Code:

Congregation’s Mission Statement:

Congregation’s Vision Statement:

List the congregation’s records for the last three years, starting with the most recent full year.

Number of confessions and reaffirmations of faith:	Current year:	Last year:
Average worship attendance:	Current year:	Last year:
Percent of apportionments paid:	Current year:	Last year:

List one or two additional accomplishments in mission and ministry that you feel are important:

- 1.
- 2.

**Ratings** for the following questions:

4 – Very effective

3 – Usually effective

2 – Occasionally effective

1 – Ineffective

### **1. Worship**

- a. The congregation is passionate about worshipping God as evidenced in joyful singing, laity involvement, and growing attendance.
- b. Laity is involved with clergy in creating worship resources and opportunities.
- c. The congregation has worship experiences that connect with residents in the surrounding community, and involves and appeals to children, youth and young adults.
- d. Each worship opportunity contains elements of both continuity and innovation.
- e. When the congregation gathers for worship, there is a sense of God's presence.
- f. Congregational worship engages one's mind and emotions and challenges the worshiper to serve in the world.
- g. Worshipers leave with a sense of joy and hope.
- h. Efforts have been made to increase worship attendance this year.

**Combined rating (add the 8 ratings above and divide by 8).**

List two specific strengths to build on, skills to be improved, and/or actions to be taken:

- 1.
- 2.

### **2. Nurture/Education**

- a. The congregation has ministries that connect with visitors and new worshipers and assists them in becoming involved in a small group and ministry activity.  
*Describe your congregation's ministry to receive people into the life of the congregation:*
- b. The congregation consistently develops and offers small group and study opportunities for all ages.

*How many small groups were offered this year? ( ) How many of them are new this year? ( ) Were there more people participating this year than last? ( )*

- ( ) c. There are teams of laity participating in pastoral care (prayer trees, phone calling, home visitation, hospital calls).
- ( ) d. The congregation works well across the different ages, cultures, political beliefs, theological beliefs and all other expressions of diversity.
- ( ) e. The congregation cooperates and works well with its staff and leaders.
- ( ) f. The congregation regularly shares faith stories in worship, small groups, team meetings, fellowship activities and other times when gathered.
- ( ) g. The congregation builds unity and harmony in their conversation with one another and refrains from gossip.
- ( ) h. The congregation feels that church leadership (lay and clergy) listens to their needs and concerns.
- ( ) i. At least 80% of the worshipers of the congregation are engaged in some kind of ministry.

**( ) Combined rating (add the 9 ratings above and divide by 9).**

List two specific strengths to build on, skills to be improved, and/or actions to be taken:

- 1.
- 2.

### **3. Service**

- ( ) a. The congregation regularly engages in ministry to the wider community.  
*The percentage of our worshipers that give five hours or more a month in community ministry is \_\_\_\_\_.*
- ( ) b. The congregation organizes worshipers to address social issues.  
*List several social issues, which the congregation addresses in the community or world, that involve more than just financial support. Indicate which ones were started within the last year.*
  - 1.
  - 2.
  - 3.
- ( ) c. The congregation identifies itself as a mission-oriented church.  
*Did the congregation offer a mission trip this year? ( ) List where and how many participated.*
- ( ) d. The congregation offers times where volunteers can talk about how they experience God on their outreach activities.
- ( ) e. The congregation listens to and tries to understand one another when engaging social issues.

**( ) Combined rating (add the 5 ratings above and divide by 5).**

List two specific strengths to build on, skills to be improved, and/or actions to be taken:

- 1.
- 2.

#### 4. Evangelism

- a. The congregation carries out a ministry to assist people in exploring their relationship with God and invites people to follow Jesus Christ.  
*List specific ministries of the congregation that help people to share their faith in Jesus Christ.*
  - 1.
  - 2.
  - 3.
- b. The congregation regularly invites new residents, unchurched, family members and co-workers to worship, growth and study groups, and/or community ministry projects.
- c. The congregation has received people into membership by profession or reaffirmation of faith this year.  
*List how many.*
- d. The congregation reflects the racial, economic and cultural diversity of its community.
- e. The congregation works well across the different ages, cultures, political systems, theological beliefs and all other expressions of diversity.

**Combined rating (add the 5 ratings above and divide by 5).**

List two specific strengths to build on, skills to be improved, and/or actions to be taken:

- 1.
- 2.

#### 5. Stewardship

- a. Worship includes a variety of methods for teaching a Christian perspective of sharing resources of time and money for God's purposes.
- b. Understandings of generosity are taught in a variety of places other than worship.
- c. Financial stewardship is talked about throughout the year and is understood as a part of a spiritual journey.
- d. The congregation supports local missions financially.
- e. The congregation supports global missions financially.
- f. The congregation manages financial resources well and provides monthly or bi-monthly financial reports for church leaders and members.

Did you fulfill your church tithe covenant to the RMC last year? Yes \_\_\_  
No \_\_\_  
Did you complete a church financial audit last year. Yes \_\_\_ No \_\_\_

( ) **Combined rating (add the 6 ratings above and divide by 6).**

List two specific strengths to build on, skills to be improved, and/or actions to be taken:

- 1.
- 2.

## 6. Administration

- ( ) a. The congregation understands the decisions and ministry of the church through a variety of communication resources (newsletter, web site, announcements, e-mail, etc.).  
*What is your best resource for communicating the vision, mission and accomplishments with the entire congregation and how often is the resource shared?*
- ( ) b. The congregation provides leadership in the community on key concerns.  
*List ways the congregation has provided leadership, not services, in the community.*
- 1.
  - 2.
  - 3.
- ( ) c. The congregation has a vision which sets priorities for mission and ministry.  
*What are your three top priorities?*
- 1.
  - 2.
  - 3.
- ( ) d. The congregation focuses most of its life on ministry rather than committee meetings.
- ( ) e. The congregation always prays, seeking the will of God, before making decisions that affect its mission and ministry.
- ( ) f. The congregation has an effective method for resolving conflict.  
*Describe your method(s).*
- ( ) g. The congregation has a program for identifying and training new leaders.
- ( ) h. The congregation encourages each other to identify and utilize their gifts.

( ) **Combined rating (add the 8 ratings above and divide by 8).**

List two specific strengths to build on, skills to be improved, and/or actions to be taken:

- 1.
- 2.

**Add the combined ratings for each of the six major areas and list the total here: \_\_\_\_**

- A rating of 22-24 indicates the congregation is functioning extremely well together. It has a clear sense of identity and is positioned for a very effective ministry of making disciples of Jesus Christ to transform individuals, the church, the community and the world.
- A rating of 17-21 indicates the congregation is functioning very well together. It is clear about its role and ministry.
- A rating of 12-16 indicates the congregation has a number of positive aspects to its ministry and also has opportunities for growth. There is a need to more clearly communicate and negotiate the effectiveness in ministry for the congregation. There is a need to identify actions, training, and support needed for the congregation to excel and collaborate in ministry.
- A rating of 6-11 indicates the congregation is not working as well as desired. There is a need to deal with issues relating to vision, mission and discipleship. The congregation may also have serious conflict issues, low morale, leadership concerns, a lack of commitment to reach beyond its own membership, or all of the above.

Prepared by the team of:  
(Please list titles and e-mail addresses)

Date:

*List how this information will be shared with the congregation and on what schedule.*

## PART II - CLERGY SELF EVALUATION

*This section is to be completed by the person being evaluated and shared with the S/PPRC for further dialogue and clarification. From time to time it is appropriate to modify the information based on conversation and clarification with the committee. Read the introduction to the evaluation process before completing.*

Name:

Date:

Position:

Years in the position:

### **Part I**

After reflecting on your goals for this past year, what were your two most significant achievements that furthered the congregation's vision and mission? What helped you accomplish these achievements and how will you build on them in the future?

1.

2.

What goals did you want to accomplish during the past year but did not, either in whole or in part?

1.

2.

What would have helped you accomplish these?

### **Part II**

**Ratings** for the following questions:

4 – Very effective

3 – Usually effective

2 – Occasionally effective

1 – Ineffective

**The following components of effectiveness acknowledge that no one person will attain precision in all areas.**

### 1. Leadership

- a. Clearly states God's vision for the community.
- b. Offers clear communication orally and in writing.
- c. Provides reflection on how faith applies to life and community issues.
- d. Models a lifestyle of integrity to the call of Christ.
- e. Empowers people for ministry within the church community and beyond.
- f. Sets a spiritual context for the administration of the church - recruiting, planning, training, organizing, financing.
- g. Challenges the congregation to grow in their understanding of stewardship by framing it theologically and grounding it in the faith story.
- h. Educates the congregation to fulfill their Church Tithe Covenant.
- i. Models life-long learning.
- j. Pays attention to family, and to spiritual and personal health and wholeness.
- k. Invites individuals to consider a call to ministry.

**Combined rating (add the 11 ratings above and divide by 11).**

List two specific strengths to build on, skills to be improved, and/or actions to be taken:

- 1.
- 2.

### 2. Community

- a. Develops networks of support and accountability.
- b. Maintains a place where spiritual friendships develop.
- c. Provides safe places to explore faith and engage in dialogue.
- d. Offers hospitality and ministry toward persons in every season of life, every racial and ethnic background, every degree of physical and mental capability and any sexual orientation.
- e. Connects the needs of contemporary people with the rich heritage of past generations of faith.
- f. Leads the congregation in evangelistic outreach that others might come to know Christ.
- g. Participates in neighborhood, community, ecumenical, and/or interfaith concerns so as to lead the congregation to be involved beyond the local church.

**Combined rating (add the 7 ratings above and divide by 7).**

List two specific strengths to build on, skills to be improved, and/or actions to be taken:

- 1.
- 2.

### 3. Spirituality

- a. Participates in spiritual formation of the congregation.
- b. Models life as a disciple of Jesus Christ.

- ( ) c. Offers meaningful corporate worship and the rituals that mark the passages of life.
- ( ) d. Through the congregational system, offers pastoral care (counseling, visitation, grief work).
- ( ) e. Through the congregational system, provides worship, study, prayer, silence, simplicity.

( ) **Combined rating (add the 5 ratings above and divide by 5).**

List two specific strengths to build on, skills to be improved, and/or actions to be taken:

- 1.
- 2.

#### **4. Transformation**

- ( ) a. Creates a climate of expectation of growth in faith.
- ( ) b. Invites individuals to take intentional steps in discipleship.
- ( ) c. Helps communities identify growth areas and address them.
- ( ) d. Helps individuals and the community to move from knowing about faith to applying faith to life.
- ( ) e. Brings the voice of the church to the social issues that shape culture.
- ( ) f. Moves outside her/his own comfort zone.
- ( ) g. Is an agent of change.
- ( ) h. Uses dialogue as a tool for bringing persons from various points of view to a common table.

( ) **Combined rating (add the 8 ratings above and divide by 8).**

List two specific strengths to build on, skills to be improved, and/or actions to be taken:

- 1.
- 2.

#### **5. Service**

- ( ) a. Gives time in community service outside the congregation.
- ( ) b. Equips individuals and the congregation to find their ministry and to pursue it.
- ( ) c. Addresses the needs of the community and world.
- ( ) d. Puts faith into action.

( ) **Combined rating (add the 4 ratings above and divide by 4).**

List two specific strengths to build on, skills to be improved, and/or actions to be taken:

- 1.
- 2.

**Add the combined ratings for each of the five major areas and list the total here: \_\_**

- A rating of 18-20 indicates the congregation and clergy are working very effectively together. The components of effective pastoral ministry are understood and guide the clergy's ministry with the congregation. The clergy and leadership should continue to maximize their positive relationship for the transformation of the congregation, the community, and the world.
- A rating of 14-17 indicates the congregation and clergy are usually working very effectively together. The components of effective pastoral ministry are understood and guide the clergy's ministry with the congregation. The clergy and leadership should continue to maximize their positive relationship for the transformation of the congregation, the community, and the world.
- A rating of 10-13 indicates the congregation and clergy are occasionally working effectively together. There is a need to more clearly communicate and negotiate the components of effective pastoral ministry. Actions, training, and support needed for the clergy and congregation to better excel and collaborate in ministry should be identified.
- A rating of 5-9 indicates the congregation and clergy are not working together as effectively as desired. There is a need to re-examine the components of effective pastoral ministry. The congregation and clergy need to identify the specific action steps and further development necessary to continue the appointment. The district superintendent is to identify and work with the clergy and S/PPRC chairperson to identify the process and procedures for improvement. If the evaluation does not improve over the next one to two years, an appointment change may be appropriate.

### **Part III**

How will you increase your knowledge and skills during the next year so that you continue to develop your strengths?

What do you need from the congregation to enhance and/or further develop your knowledge and skills? If you are an associate pastor or deacon, what do you need from the congregation and lead pastor to enhance and/or further develop your knowledge and skills?

What do you need from your district superintendent/conference to build on and further develop your knowledge and skills?

Do you take Sabbath time each week and vacation time each year for renewal and rest?

How do you spend your Sabbath time and how many weeks of vacation did you take in the past year?

How is your personal prayer life? How do you practice spiritual disciplines? How is your faith growing?

**Part IV**

List your three to five goals for the coming year and explain how you believe each will support and implement the congregation's and conference's vision and mission. These goals should be:

- Specific
- Measurable
- Attainable
- Relevant/Realistic
- Timely

1.

2.

3.

4.

5.

Share additional information you want the S/PPRC and district superintendent to know about you and your ministry (achievements, challenges, professional/personal needs, etc.).

### PART III – CLERGY EVALUATION

It is recommended that each S/PPRC member complete an evaluation form for each clergy serving the congregation. The committee will then meet to review the clergy's self-evaluation, collate their own responses, reflect together, and agree upon a final *Clergy Evaluation*. Once the committee has made its final draft, the committee should meet with the clergy to share the evaluation. For associate pastors and staff members, the lead clergy may be part of the process of evaluation. The evaluation of an associate pastor and/or staff member is to be shared with the associate pastor and/or staff member with the lead clergy present.

Name:  
Position:  
Church:

Date:  
District:  
Zip Code:

**Ratings** for the following questions:

- 4 – Very effective
- 3 – Usually effective
- 2 – Occasionally effective
- 1 – Ineffective

**The Rocky Mountain Conference affirms the following components of effectiveness, realizing that no one person will attain precision in all areas.**

#### **1. Leadership**

- ( ) a. Clearly states God's vision for the community.
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( ) **Combined rating (add the 11 ratings above and divide by 11).**

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## 3. Spirituality

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- d. Through the congregational system, offers pastoral care (counseling, visitation, grief work).
- e. Through the congregational system, provides worship, study, prayer, silence, simplicity.

**Combined rating (add the 5 ratings above and divide by 5).**

List two specific strengths to build on, skills to be improved, and/or actions to be taken:

- 1.
- 2.

## 4. Transformation

- a. Creates a climate of expectation of growth in faith.
- b. Invites individuals to take intentional steps in discipleship.
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- g. Is an agent of change.

- ( ) h. Uses dialogue as a tool for bringing persons from various points of view to a common table.

( ) **Combined rating (add the 8 ratings above and divide by 8).**

List two specific strengths to build on, skills to be improved, and/or actions to be taken:

- 1.
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( ) **Combined rating (add the 4 ratings above and divide by 4).**

List two specific strengths to build on, skills to be improved, and/or actions to be taken:

- 1.
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Prepared by the team of:  
(Please list titles and e-mail addresses)

Date:

## DS SUPERVISORY TOOL

Paragraph 421.2 of The Discipline states: “The District Superintendent is responsible to establish a clearly understood process of supervision for clergy of the district, including observation of all aspects of ministry, direct evaluation, and feedback to the clergy involved.” The goal of each District Superintendent is to meet yearly with each clergy appointed to his/her district for the purpose of supervision.

To that purpose, your DS may ask for your written responses to the following questions. These questions and your answers will form the base for the yearly meeting between you and your DS.

1. What have you learned about spiritual leadership this year, and what do you hope to learn in the coming year.
2. Where do you find support and accountability? For yourself? For your congregation? Who loves you enough to tell you the truth?
3. What are your spiritual disciplines or practices that support and nurture your journey of faith?
4. Where have you seen transformation in yourself, in your congregation, in your greater community?
5. How are you personally putting your faith into action, and how are you inviting the congregation to service?
6. In light of this conversation, how would you want me to hold you accountable for what you’ve shared? (What would you like me to ask you about next year?)
7. What else do you want me to hear?

## **APPOINTMENT EXIT INTERVIEW**

To be conducted with the exiting pastor and S/PPRC chair {or representative, if necessary} by the district superintendent

1. How have you grown in your spiritual leadership in this appointment?
2. What learnings from this appointment do you carry to your next?
3. What has empowered you in this community; what has most challenged you?
4. Where have you seen transformation in yourself and in this community of faith?
5. What words would you share with the next pastor in this appointment?
6. Where would you see this church going in the next five to ten years?
7. What else would you like us to hear?

## TRANSITION CHECKLIST

Smooth transitions in pastoral leadership are vital for the health of the congregation and for a proficient beginning for the new pastoral leadership. Providing the following information will assist in a smooth transition and is an act of collegiality.

As an act of our covenant together, the exiting clergy and the S/PPRC are asked to complete this transition checklist for the newly appointed clergy. You may enlist the help of other church leadership.

Items to leave:

- Copy of mission/vision statement
- Most recent church conference booklet/paperwork
- Church directory
- Church e-mail list
- Church policies for weddings, funerals, building use, personnel, etc.
- Current and last two year's budgets
- Latest month's financial statement
- Church newsletters
- Bulletin for each worship service
- Bulletin for most recent Easter, Christmas Eve and any other special services
- Church keys
- Church profile

If there is a parsonage:

- Manuals for all appliances
- Names and phone numbers for plumbers, electricians, snow removal, lawn care, trash removal

Please answer the following as applicable.

### 1. Organization

- Are any staff positions currently vacant?
- Are any staff changes expected?
- What yearly events happen in this congregation, and where can information about them be found?
- Describe any committees/ministry teams that function differently than standard expectations.
- Is there a ministerial association? Contact information
- What agencies or individuals are used for emergency food, clothing, shelter, assistance, etc.?

### 2. Financial

- Is there a Stewardship Committee separate from the Finance Committee?
- Is there a year-round stewardship program?
- What is the number of pledging households?
- What is the number of non-pledging households?

- What is the average pledging household contribution amount, and what amount do the top 10% of the households give?
  - How many households give less than \$50 per year to the church?
  - Does the church have a Permanent Endowment Committee and/or Fund?
  - What age group is the primary financial influence in the congregation?
  - Where does the church have charge accounts?
3. Technology
- Is the church computerized? Networked? Internet accessed?
  - What forms of computer technology are used in worship?
  - Does the church rely on e-mail communication with the congregation?
  - Does the church have a web page and if so, how is it maintained and developed and by whom?
  - What are website and e-mail addresses and passwords?
  - Does the church have its bookkeeping, membership and contribution system computerized? If so, who knows the software?
4. Communications
- How does the church communicate with its members?
  - How does the church communicate with those it is seeking to attract (advertising)?
5. Worship
- Who is involved in planning worship (laity and staff)?
  - What are the times of all worship services?
  - Are any new services being planned?
  - What is the primary role of the clergy and the laity in each service?
  - What is the average worship attendance, is it increasing or decreasing, and why?
  - What is the role of children and youth in worship?
  - Is there children's worship in a separate area of the church building?
  - What style(s) of worship are currently being offered?
  - Where can special decorations (Christmas, Easter, etc.) be found?
  - How is the bulletin prepared and who is involved?
  - Is there a preferred style for communion?
  - Are there ecumenical community worship events? When?
6. Pastoral Care
- What families/individuals are currently experiencing loss, illness, special needs?
  - If there are inactive families that might benefit from a contact from the church, who are they?
  - Who are the shut-ins/homebound, and how are they contacted?
7. Building
- How are building items (i.e. sound systems, musical instrument tuning, ordering supplies, safe deposit box, etc.) handled?
  - What community groups use the building?

## **GUIDELINES FOR APPROPRIATE CONDUCT BY CURRENT AND FORMER PATORS**

In the Rocky Mountain Conference we serve as colleagues in a covenant community. We all wrestle with the complexity of pastoral relationships and friendships with parishioners that require us to be sensitive and clear, especially after we have ended an appointment. These are some behavior guidelines so that our covenant community is honored.

- Make no disparaging remarks about the work or life style of a predecessor, successor or other ministers.
- Practice the same ministerial code of ethics with pastors and congregations of other denominations as would be expected in the United Methodist Church
- Perform no pastoral functions in any church or charge to which the minister is not appointed, except at the request and under the direction of the pastor in charge.
- Upon leaving the appointment, including retirement, sever pastoral relationships with parish, recognizing that all future weddings, baptisms, communions, counseling, visitations, and funerals should be fulfilled by the successor pastor, unless an unusual situation exists and is approved by the successor pastor.

To be clear: When you receive a request from a former parishioner you will always refer them, without comment to their current pastor. You will only agree to any involvement after the appointed pastor invites you to participate.

The currently appointed pastor is also expected to be sensitive, gracious and appropriately including of former pastors.

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