

# Amalgamations & Mergers

Last Gasp or New Ministry?

Second Edition: Summer 2018

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**A**malgamation and merger have got to be two of the hottest words in the congregational development vocabulary these days—hot in the emotional response they inspire and hot for the lack of clarity and guidance available. Increasingly churches are looking to amalgamations to regroup, strengthening their resource base in response to declining and aging congregations.

Over the past twenty years, I have had the opportunity to work with many congregations at various stages of amalgamation or merger. This work, and that of colleagues and congregations who have taken this journey, has given rise to a body of expertise—theory and methodologies, many stories—and some experienced, wise people have come out of it. What has become abundantly clear is that, even at the best of times, amalgamations and mergers are messy! They take a tremendous amount of energy, time, skill, leadership, and faith.

The first mess we encounter is our use of language. It is not helpful to use merger and amalgamation interchangeably to describe the coming together of two or more congregations. The two processes

have different expectations, goals, tasks, risks, and benefits. To mix and match name and intent muddles expectations and complicates communications unnecessarily. Here is a helpful way to understand the distinctions between mergers and amalgamations:

## **MERGERS: A + B = A SOMEWHAT BIGGER A**

Mergers happen when one or more congregations join another. In most cases there is considerable size difference between the congregations, but this is not always true. The following are indications of a merger:

- One congregation retains its name or the founding congregations join their names, often with a hyphen.
- One congregation retains its building without significant redesign.
- Only the congregation losing its building has rituals of closure.
- Clergy and paid staff from the host congregation stay.
- One congregation's identity dominates. There is a persevering 'host-guest' dynamic in the new congregation.
- Resources and leadership roles are shared but the structure itself isn't changed (e.g., memberships on existing committees and boards are adapted to include equal representation from each congregation; existing staff are accommodated with relatively unchanged job descriptions; while funds may increase, budget allocations remain the same).

## **AMALGAMATIONS: A NEW CHURCH IS BORN**

Amalgamations are more rare. Here, two or more congregations close so that together they can create a new congregation. The following are indications of an amalgamation:

- The congregation has a new vision and ministry plan that focuses on both what happens (program) and how it happens (process).
- The congregation has a new name.

- A new church is built or an existing church is substantially redesigned.
- All founding churches have rituals of closure before the new church opens.
- All staff (clergy and lay) leave within 18 months of the amalgamation.
- There is a plan for intentionally rebuilding a new congregational identity which includes the development of shared symbols, rituals, stories and traditions.

There is also a third option, absorption. We see these when a very small, tired congregation decides to join a neighbouring church. The following are signs of an absorption:

- Energy and activity goes into choosing a good new home church for the congregation. Often the small congregation will go together to visit a number of possibilities before deciding where to move.
- When possible, visioning focuses on the small congregation's legacy and, in particular, how their funds will be used by their new church home and/or for outreach and mission-  
al projects.
- Planning focuses on hospitality—how the new congregational members will be welcomed and included in their new church. Particular attention is paid to pastoral care and fellowship.

## MOTIVATION

### Expectations and Experience

Difficulties and messiness also arise from paradoxical expectations and motivations. Congregations choose to merge, amalgamate, or absorb for many reasons. Some have reached a stage of crisis or recognize that they are on a path of irreversible decline. Others are motivated by a desire to create a congregation that has enough resources and programs to respond to the needs of their community and context.

Congregations entering a merger or amalgamation can be acting out of different motivations. Imagine one congregation looking to amalgamate because they can no longer sustain their ministry, while the partner congregation sees the relationship as an opportunity to add newcomers to a self-sufficient congregation. This is a typical example of the power imbalance that can underlie and derail a merger or amalgamation relationship from the start. Many amalgamations have been stalled by a smaller congregation's resentment over being treated like a poor cousin or a larger congregation's empire-building behaviours and attitudes.

The power differences are real and have implications. It is in no one's best interest to pretend they don't matter. Leaders can work to ease the tensions and create more equitable negotiations through the development of motivation, and through the covenanting processes that will frame the relationship and negotiations.

The long-term health and effectiveness of the new congregation is jeopardized when a merger or amalgamation is built on the need or enthusiasm of one congregation and the apathy or passive benevolence of another. Leaders must evoke and build a vision and vigour for what is only possible together and corresponding dissatisfaction with the status quo. In this way the desire for a new ministry will be shared even though the motivations of the congregations might be very different.

Covenanting between the congregations should occur at each significant decision-making moment in the process, such as when first entering serious dialogue and in preparation for a vote. In the covenant, each congregation states what they will put aside or give up in order to have energy for the project; they will also agree not to bind themselves into relationships with others (such as leases) which may impede the amalgamation or merger. Equitable partnerships will be facilitated when the congregations share the vulnerability of giving up some of their security (financial or programmatic) to engage fully in the amalgamation process.

## Conflicting Desires

Regardless of motivation and enthusiasm for coming together, the process always surfaces a set of new hopes for church life which

come into conflict with other commonly held desires. Most of these are related to congregational size. They will likely include the following:

- Having the desire for lots of people and resources and the desire for intimate community (belonging to a church that feels like a family, where everybody knows your name)
- Creating something fresh and new and preserving all our congregational habits, traditions, symbols, rituals
- Needing a more formal organizational structure to support a larger ministry and wanting to function with the flexibility and informality of a smaller congregation

No congregation can fulfill all of these desires. The paradoxes must be recognized, named, and managed along the way. Choices need to be made; people will feel uncomfortable and grieve what is lost.

One common motivation is simply unrealistic. Many congregations merge or amalgamate to grow numerically beyond the sum of their memberships. But research and experience show that, at first, congregations will lose members. Not everyone will agree with the new vision. Not everyone will be able to make a change of this magnitude. People who have a weak attachment to the congregation, or whose greater commitment is to a building rather than the mission, may choose this time to leave.

It will take time for the new congregation to make the transition and redirect energy from the process of coming together towards evangelism and new member ministry to people beyond the founding congregations. Even in the most positive situations it may be a few years before the new congregation is ready and able to grow in numbers.

Don't underestimate the importance of focusing on in-reach. Amalgamations and mergers that are built on practices of extraordinary and unexpected hospitality have the best chance of success—both for retaining their membership and for attracting new members.

One of my favorite chance meetings makes this point. While at a conference, I met the new minister of church whose amalgamation I had facilitated four years earlier. When I asked how it was going—"Oh - it's so much work!"—my heart sank (we were in a group

and I thought I was in for a very public problem-solving session). But then they went on, “It’s crazy holding it all together now that the newcomers outnumber any of the original congregations,” (and I jumped with joy).

Research on merged congregations shows that they will have a longer wait for numerical growth than amalgamated congregations, if they ever grow at all. Because the tasks and struggles of learning to live together in a merger are often managed less intentionally—in a problem-solving rather than strategic mode—they can be fraught with unexpressed and unresolved issues. If you are already busy managing a new and significant ‘host-guest’ dynamic between the merged congregations themselves, is there room for more guests? Sadly, time has shown that most mergers simply slow the decline so that the congregations have a few more years before they once again need to face the inevitable decisions of amalgamation, closure, or another merger.

These cautionary notes are not intended to discourage leaders. The new congregation is likely to be in much better shape for growth after the amalgamation or merger has settled than either congregation would have been on its own. Rather, what we need to do is develop realistic expectations, understand the tasks of change and stabilization that must be articulated and managed, and deal with the inevitable anxiety.

## A Preference for Amalgamation

Mergers are the more common experience because they offer the path of lesser resistance and take less time and energy to plan. However, one has to ask whether most mergers are new ministry developments or attempts to rationalize resources—in the hope that two or more struggling congregations will make one larger and more self-sufficient church. Given the widespread and critical need for churches to become missional, the vision-driven imperative of amalgamations must be the preferred model. Even when merger is the only possibility, we can still learn, adapt, and use some of the tasks and processes of amalgamation.

Amalgamation takes time. When the congregations are highly motivated, it can happen within two or three years. Often it takes

much longer. It's not unusual to find that it's been fifteen years from the first conversation to full establishment! However, these days, few congregations have the luxury of it taking this long. Regardless of time, there is always a three-phase framework of preparation, transition, and establishment to be followed.

## THREE-PHASE AMALGAMATION PROCESS

### PREPARATION

*Form a Steering Team -> Visioning Discussions -> Information Gathering -> Relationship Building -> Vision Plan Proposal for Amalgamation -> Congregational Consultations -> Vote to Amalgamation.*

The preparation phase is the time between when the congregations have agreed to explore the possibility of amalgamation as an option through to the event that immediately precedes the congregations' commitment to become a new church together. It's often described as the 'dating' phase—where the congregations discuss their hopes and worries for the future, and freely share information about themselves. In highly intentional processes this pre-amalgamation phase can last for as little as 9–12 months. Sometimes it lasts longer. It ends once congregations have made the formal decision to proceed towards amalgamation.

### Steering Team

The work of this phase is guided and led by a steering team, with an equal number of members from each congregation considering the amalgamation. Ideally they include people who have positions of both formal and natural authority in the congregation. The team should include trusted members of the congregations' leadership or governance board/council, and members who know the history and people of the congregations well. These will be people who have a good sense of the emotional life of the congregation without being blocked by it. The book *Our Iceberg is Melting: Changing*

and *Succeeding Under Any Conditions* by Holger Rathgeber and John Kotter (2006) is a particularly good resource to understand the makeup of a good team and the tasks they need to accomplish when leading an effective and successful change process.

The inclusion of the ministers on the steering team depends on the denominational polity and practice and the instincts of the congregational leaders. This is also where an outside consultant can be very helpful because it is always a judgement call. I have consulted in situations where the ministers were important and effective leaders in the process. At other times, the conflicts of interest inherent in an amalgamation were simply too difficult for the ministers to overcome and they became blocks to the change. If the choice is to not include the clergy on the steering team, make sure that the consultant or delegated members of the steering team meet with the clergy directly after each steering team meeting to share what is being planned and decided.

The steering team guides the following activities. In addition to receiving and debriefing the information, they organize communications with the congregations. At the conclusion of the preparation phase they create a Vision Plan Proposal for Amalgamation, which is circulated to the congregations. The team then hosts consultations or town hall meetings to hear people's reflections and respond to their questions. This proposal is the basis of the congregational vote on whether or not to proceed towards amalgamation. Occasionally the proposal will need to be amended before the congregations feel ready to vote.

## Preparation Activities

[A] Visioning conversations are held in the congregations, both in separate and mixed groups. During this time each congregation needs to explore and articulate key aspects of its own identity.

- Who are we as a community?
- What are our most treasured stories, possessions, rituals and traditions?
- Who are our heroes?
- Who is the Jesus people meet when they meet us?
- What can we contribute to a new ministry?

- What will we let go or change?
- What must we keep?
- What are our values? How will people know we value these things?
- What will we receive from the identity of the other congregation(s) in the amalgamation?

The goal is to include as many as possible in at least one discussion. The results of these conversations are made public—in print and on bulletin boards—so that everyone can follow the emerging vision and plan.

It is not unusual for ideas for a new name to emerge during these discussions. Keep track of all that are suggested and share them so that people can begin to consider the options.

[B] Pertinent information is collected on demographics, finances, legal issues, real estate options, contractual obligations, denominational polity and human resources issues. The goal is to be able to answer any question asked by the congregations regarding the resources available to the amalgamated congregation, and the processes required to become amalgamated.

Be prepared. Make sure that the information you collect is checked for accuracy before being made public, and expect that there will be doubts and imputations of inaccuracies or misreadings. For some, the information generated and shared will be a test of the trustworthiness of the process. The way the steering team handles themselves in these situations is an opportunity to demonstrate non-anxious leadership.

[C] At the same time, relationships are formed between members of the congregations through meetings, social gatherings, joint task groups, joint worship, and the process of designing the new space and choosing a new name.

- Be purposeful. Don't let an opportunity go by without facilitating unexpected hospitality. For example:
- Use name tags at joint worship. Have the steering team function as the hosts, welcoming and introducing people to each other before worship and at coffee hour. Offer conversation starters at coffee hour.

- At mixed discussion sessions, be sure to include an ice breaker.
- Participate in each other's events (bazaars, dinners, women's and men's groups). Go further than just extending an invitation—make it personal and have a hospitality plan in place for welcoming and including your guests.
- Tell the stories of how people have been meeting each other. Include a minute in your worship services to have someone tell their story of getting to know a member of your partner congregation.

One congregation asked people to write their favourite vegetable on their name tag (along with their name). There was more conversation and laughter about Brussels sprouts than anyone had ever imagined.

This is a good time to do an inventory of skills with members. There are lots of jobs to be done and new leadership required. It will be easy to make meaningful connections between the work of building the new church and peoples' skills and gifts.

Don't underestimate the need to purposefully plan social and other relationship-building opportunities. In the work of amalgamation, this can too easily get dropped and the amalgamation will suffer. It is common for people to use the excuse of not knowing people in the other congregations as the eleventh-hour excuse for not voting for the amalgamation.

[D] Options are explored, proposals developed, and the Vision and Plan Proposal for Amalgamation is written by the steering team. The plan is circulated to the congregations for consultation. The plan will articulate the following:

- What is God's call to us—to our ministry in our area? What are the exciting new possibilities and opportunities that motivate us to make such a significant change?
- What can only, or best, be accomplished as an amalgamated congregation? What will make this possible?
- What do we believe to be the non-negotiables in the amalgamation? Why are they so critical to our identity and ministry?

Once the congregational consultations have happened, and any amendments to the proposal made, you are ready to call the vote. Voting will happen based on the denominational practice. Always seek advice from your judicatory when planning the vote. In general, congregational members should be asked to respond to a simple yes/no question. Some denominations require that this is accompanied by a covenant, which will be an executive summary of the Vision and Plan Proposal for Amalgamation.

People who have gone through successful amalgamations advise:

- Determine clear timelines and stick to them during the active preparation phase. There is comfort in knowing when each phase of the process begins and ends.
- Use pre-existing committees, meetings, and sermons for dreaming and visioning.
- Constitute task groups by ministry area with membership from each congregation (e.g., worship, property, education, relationships with tenants) to focus on the details. They can research, report, recommend and amend plans for an amalgamated ministry. They can be invaluable in helping manage the transition tasks once the amalgamation has been agreed upon.
- Include a judicatory representative and someone who has experience in amalgamation from another congregation in the steering team. Outside consultants are also very helpful. They can provide good connections, objectivity, and advice.
- Communicate. People get most frustrated and angry when they feel they are not being kept informed. Make sure the communication extends to people who may be absenting themselves from the process. They are likely to intervene to block change as the final decisions approach.
- Make one good decision at a time. Assess what the congregations are ready to say 'yes' to before you set a vote.
- The journey may be longer than you think. It may take a series of processes and decision-making events to get to an amalgamation.

# TRANSITION

*Joint to new committees and governance -> New formal policies and structures -> Pilot projects -> Legal work to become a new congregation -> Staffing decisions -> Ministry staff changes*

Transition begins with the joining of congregations and ends with the departure of all ministry personnel from the founding congregations. It usually lasts 12 to 18 months. The primary task is to work out the details of the new life together. This is best accomplished if the focus is on developing a sense of stability and permanence.

The tasks of every committee and working group is to operationalize the Vision and Plan for Amalgamation. Now that the vote has been successful, the plan is no longer a proposal but the guiding document for all the activities, changes, and developments of the new congregation. In the transition phase, it is imperative that the vision and plan not get lost in all the detailed logistical work to come. Delegate a new small team made up of members of the steering team and members of the joint or new council; they will function as a 'bird's-eye view' group. Their job will be to help the new congregation's leadership keep focused on the vision, plans, and goals that have inspired the amalgamation.

It never fails to surprise me how easy it is to forget the vision and goals when you're in the middle of implementing the amalgamation decision. It can seem like there are two different processes at work. Managing all the logistics of the amalgamation feels substantial—like the real work—and if you're not careful, creating new ministries can feel like an optional extra. It's a good idea to put a copy of the vision and goals in the centre of the table at every meeting as a reminder to keep your focus.

Now, in the transition phase, every ministry area (e.g., worship, outreach, pastoral care) will officially begin working together. They often begin as joint committees, then, within the first year, they become newly constituted committees, or working groups of the new congregation.

Providing pastoral care to people who are struggling with the amalgamation, or who have chosen to withdraw, is a priority

during the early transition phase. There will undoubtedly be people who choose this time to leave their congregation; some will be angry, others grieving. While we can't control what people will do, we can act with compassion and understanding.

In a recent amalgamation the congregation chose to adopt a 'no one gets left behind' policy. We knew that people would take this opportunity to leave so one of our first decisions together was to hire a part-time pastoral care minister whose mandate was to provide support for those who have pulled away from the church because of the amalgamation. If they weren't able to come along with us, we would go to them.

Anecdotally, it has been observed that when this sort of pastoral care is provided, many of those who have withdrawn will find their way back to the newly amalgamated church. They just need some time and care-filled attention. If not, the pastoral care minister can help them find a new church home elsewhere.

Transition is a time when the leadership must be highly intentional about developing a new organizational system, new governance, and new methods of decision-making.

- Recontract with staff and volunteers, especially the
- treasurer, and chairs/co-chairs of committees.
- Develop new routines, new committee or working group structures, and new communications tools.
- Develop a new budget.
- Develop and agree on new policies to support the life and work of the congregation. For some denominations, this will take the form of a Constitution.
- When the founding congregations are of very different sizes, agree when and how the voice of the smaller congregation(s) will be heard in decision-making.

Begin to develop a shared story by resourcing a few new projects and quick-win accomplishments. Choose ministries which would be new or feel very different to the founding congregations. Connect them to the dreams and visions of what could only be actualized together, which emerged from the preparation work. Include people from all founding congregations.

Agree that no member of the new congregation will be identified by their previous church membership and find some fun ways of implementing the decision.

At each council and committee meeting we had our 'oops jar.' Anytime someone forgot and identified themselves or someone else by their original congregation they had to drop a quarter into the jar. The proceeds went to outreach, of course!

People who have gone through successful amalgamations advise:

- With staff comes power and comfort. Retain the paid ministry staff from all founding congregations for the first year after amalgamation. If you can, also retain other paid staff such as the musicians, custodians, and administrative staff.
- Changing musicians can be a contentious issue during an amalgamation. Musicians, in particular, can be symbolic of the identity of a congregation. Music touches our souls and shapes our relationship with God. It's best to find a new musician for the new church. When one congregation's musician(s) remains, it is difficult for the other congregation(s) to trust how their values will be honoured. This dynamic will need to be managed.
- Never hire an office administrator from one of the founding congregations. Always hire from outside your congregation(s).
- Encourage new ways of getting things done. Habit and inertia are very powerful forces, so doing things differently needs to be planned and facilitated.
- Pay attention to both formal and informal processes. Formal processes include meeting structures, decision-making systems, and leadership roles. Informal processes include coffee-hour conversations, ad hoc work, and social groups.
- Try to pare down governance as much as you can. People being worn down by administration, and not having enough energy left for creative ministry, is usually one of the key motivations for an amalgamation. Use this dissatisfaction to try out some more streamlined leadership options.
- Create organic structures which reflect the key values and activities of people. Encourage experimental or pilot proj-

- ects. When allocating resources and authority, give priority to task-oriented groups over governance-oriented committees. Avoid locking into official roles and rules too quickly.
- Pay close attention to ritual. Good closings and openings are crucial. They are not just for the worshipping community but for the committees and other groups which represent the heart and soul of the congregation and are also closing and reshaping (e.g., prayer circles, Sunday school, youth group, social justice committee).

As this phase ends, paid staff leave (such as clergy, secretaries, custodians, and musicians). Their departures open the way for the congregation to work at putting their new vision and mission into action through hiring personnel.

## ESTABLISHMENT

This begins with the selection of new clergy and lay ministry personnel, and usually lasts two to three years. Chances are good that by now most of the leadership is exhausted. This is particularly important for new clergy and staff to recognize as they enter their new ministry with energy and enthusiasm and are met with a congregation who may need to have a Sabbath time of recreation and spiritual renewal. However, it is important that the congregation keeps going, not letting up on the changes being implemented, developing their vision, and initiating ministries which will live out this mission.

Never forget the Peter Drucker quote: “culture eats strategy for breakfast.” It took continued effort on the part of our leadership for over three years to hold onto our vision for the new church we were committed to creating. We expected conflicts, bumps, and setbacks. We knew people were acting from habits and expectations that they didn’t even know they were carrying. We knew we would get it wrong and were determined to learn from these experiences and keep moving.

## A progression of decisions

Change takes time. It is reasonable to expect that any focused work on amalgamation and merger has been preceded by a much longer period when the individual congregations have been discussing options and making decisions for their future. David Lloyd George, a former British Prime Minister, advised, “Don’t be afraid to take a big step if one is indicated. You can’t cross a chasm in two small jumps.” However, not all congregations are ready to negotiate an amalgamation in one vote. It can seem like there is a great distance between “Let’s explore the possibility of amalgamation!” and “Let’s vote to amalgamate!” It is the role of leadership to measure the size of jumps their members are able to manage. Some congregations who have already been struggling honestly with their viability for a while may be more ready to leap this chasm—from initiating the discussion of amalgamation, directly across to the final vote—fairly quickly. Many other congregations will not be able to make a straightforward connection. Asking them to make a momentous decision too soon will stall or stop the process.

The role of leadership is to present appropriate decisions for the congregation or their delegates (a board, council, or executive committee) to deal with in a timely, but not overwhelming, manner. Things to consider include the following:

- To what extent has the congregation been thinking about participating in an amalgamation or merger? How long has the topic been discussed as an option? How widespread is the conversation? Is it part of the official or unofficial (coffee hour & phone calls) conversations in the church?
- How much resistance to change do you perceive from the congregation? What are the wise women and men of the congregation saying?
- How does the congregation make decisions? Are they quick and decisive or do they work best when taking time for consideration?
- What do you believe the congregation can cope with at this time? What could the majority of people agree to? Is there the will to actually do something new?

## Deciding to enter an amalgamation preparation phase

Often the first question to pose is: Are the congregations willing to explore opportunities for ministry and mission within their geographical area that could best be accomplished together? This takes congregational leaders—usually an ad hoc working group delegated from neighbouring churches' boards or councils—into a time of meeting, sharing, and working with information regarding their social and demographic context and their congregations' identity and internal demographics (e.g., trends in attendance, ages of members, finances). The results of this exploration, which are best communicated to the congregation through a report, will respond to two questions: Is there a shared problem? and Is there a shared opportunity? It will identify, usually as a continuum, the different points of view which emerge regarding the future shape of mission and ministry in the area and the amount of energy that should be expended in further explorations.

It is best to be honest and direct. People need to see their opinions expressed in this report. It's the ad hoc group's responsibility to articulate the range of options that would be present in their congregations. An example of this type of continuum is as follows:

- I. Stay as we are. Accept that as congregations close, members will be welcomed into neighbouring congregations. Do not spend any energy working together. Spend energy on strengthening existing congregations or working to closure.
- II. Stay as we are as much as possible and concentrate on strengthening existing congregations. Spend some energy on cooperation and joint projects where these do not interfere with existing programs (e.g., refugee resettlements, Out of the Cold, and youth programs).
- III. We need to work at being missional first, so we need to spend significant amounts of energy now in joint, experimental ministry projects (e.g., Messy Church, Pub Church, vacation bible school, nearly new clothing shop). A task force will examine the possibility of entering an amalgamation or merger process and its effects on ministry, personnel, stewardship of resources including buildings, and gover-

nance, and report their opinion to the congregations after six months.

- IV. Time is short. The issue of amalgamation is urgent and needs to be addressed now. We still have some energy, financial stability, and momentum for revitalization but these resources won't last much longer. Together we would have the people, assets, resources, and vision for the church of the future; delaying will erode this strength. We should move now towards creating and implementing our vision of a stronger, missional, amalgamated church.

In a complex situation where five neighbouring congregations set out to explore the possibilities for their future, we came up with four options. These represent the opinions we knew were being talked about in our congregations. We realized that the emerging consensus was for the possibilities that option III represented. We needed to try some things together before our congregations would invest in an amalgamation process. Our pace was set. We did some new projects together—ideas that had been brewing for a while. Our committees and councils all met together at least once. We came to each other's events. After a year, four of the five congregations agreed to enter a formal amalgamation process.

## Adding Process

Amalgamations are complex. Leaders have the challenge of dealing with an extensive list of logistical tasks and decisions, plus a veritable sea of emotional processes—their own as well as those of the congregations.

Mergers and amalgamations disrupt the established systems and churn up a sea of emotions which underlies congregational life. The processes of loss and reintegration bring people and communities into a highly ambiguous state of strong feelings, disrupted authority, and changed communication paths and relationships. People will become deeply unsettled. When this happens, we evoke emotions which can be both profoundly creative and potentially devastating. It is this volatility that will either fuel or stop change. In either case, there is tremendous energy. Leaders must have the courage to acknowledge and work with the deep feelings of exhilaration and loss.

We ignore this task at our own, and the community's, peril.

The dynamic interaction between values and events  
Congregations have values which are expressed in every aspect of their ministry, in what they do and how it gets done. Understanding the powerful and dynamic interaction between values and events means recognizing how formal and informal processes work within a congregation's system. Managing their interaction means surfacing and working with the expressions of emotion, meaning, and desire for the community's future. These expressions need to be linked to the formal processes steering the amalgamation.

Formal processes constitute a congregation's organizational structure. These are the public, mandated roles and functions noted in our constitutions, annual reports, and weekly bulletins—to which representatives are elected, appointed, and hired (i.e., board and committee members and chairs, and staff). They are the approved and public ways we share tasks, authority, accountability, and responsibility (i.e., congregational meetings and votes, boards, committees, task forces, and working groups). Formal processes also include our public methods of communication (e.g., sermons, newsletters, bulletins).

Informal processes can be much more difficult to see at work. These are our common practices, the often intricate web of relationships and paths that people actually follow when sharing information, making decisions, and getting things done (e.g., the phone networks, coffee hour, and parking lot conversations). They are deeply entrenched, regular and historic, and imbued with meaning and a sense of rightful order and authority. They involve the congregation's real decision-makers regardless of official title or role: the matriarchs, patriarchs, gatekeepers, historians, bankers, patrons, heroes, and scoundrels of our communities. These processes exist to maintain and protect the congregation's equilibrium, and they are strong. In any conflict between formal and informal processes, the informal processes will always win.

As an amalgamation process disrupts a congregation's established system, it activates and incites the informal processes. Imagine two layers of activity occurring simultaneously. At the surface are the practical activities and decisions of amalgamation. Most of these are designed with the purpose of profoundly changing the

structure and formal processes of each congregation. Meanwhile, underneath these activities are an abundance of values, expectations, relationships, and allegiances, which—when disrupted—result in potent emotional reactions. Regardless of enthusiasm for the amalgamation or merger, congregations will churn up all the emotions of profound change—excitement, courage, elation, anger, gratitude, despair, withdrawal, regret, grief, sadness—and the list goes on. If left unacknowledged and unmanaged by the leadership, the congregation’s informal process system will act to stabilize the community and calm the turbulent sea of emotions. This does not necessarily mean the merger or amalgamation will be stopped. Depending on the opinion of those in authority, stabilization could be accomplished either by stopping change or by moving it ahead quickly. The objective of these informal processes is to return the congregation to a place of comfort and low anxiety.

Transformation takes time. While it can feel chaotic and, at times, traumatic for truly new ministry to arise, disruption is to be encouraged. This is a task of leadership, because for the amalgamated congregation to be successful, both formal and informal processes need to be made new. Leaders need to get in touch with these emotions, bringing them into the open and finding ways the community can appropriately acknowledge them without getting stuck there.

## Linking meaning and value with the tasks of amalgamation

Bringing emotions to the surface can be done through activities, usually formal processes, which are developed to help the community express potent meanings and values. Some of these activities will be unique to amalgamations and mergers, while others will be the stuff of normal parish life. Each holds the potential to displace the informal processes of the congregation. The following activities can help to surface emotions:

- Joint social, programmatic and worship events
- Covenanting or contracting between the congregations
- Biblical and theological reflections done in groups or with individuals, in sermons and in newsletter articles

- Music, especially congregational singing
- Building a vision, setting goals and then achieving them
- Choosing a new name
- The design and decoration of the new space
- Rituals of closure and opening

These activities are, by their nature, expressive. They are also opportunities for creativity, participation, and innovation.

Designing link activities requires leaders to adopt an almost anthropological approach to their congregation. Seeing the congregation as a stranger might help to identify: What does this community care most about? and, What are their symbols and rituals and what do they mean?

Outside facilitators or consultants can really enhance the design of link activities. Without any emotional associations, they will see the congregation's value system and the connections which can be made through the link activities much more clearly than the internal leaders.

Here is a discussion of a few link activities that have worked well for congregations in amalgamations.

*Joint events* are the principal linking activities. They can be social, liturgical, or task related. They are wonderful opportunities to include community building, storytelling, and music. Going a little deeper, congregations can hold small joint group sessions for a variety of reasons relating to the amalgamation such as biblical and theological reflection, learning, personal support, and prayer. The larger tasks of developing a vision and mission, choosing a name, and generating ideas for the design of the new church can also be accomplished in special joint visioning day events.

Joint events also provide opportunities for people to experience what might only be possible through amalgamation. Large, creative worship services with both choirs and lots of children are very powerful expressions of the vital and energetic church most people hope an amalgamation will make possible. Other popular choices are to initiate a joint outreach project, hold common choir practices, put on a concert together, and/or hold seasonal educational events such as Advent or Lenten study.

# CONNECTING WITH THE SEA OF EMOTIONAL PROCESSES

*The Sea of Emotional Processes  
(an incomplete list)*

*Formal Processes  
(an incomplete list)*

## *Link Activities*



*communicating with congregations  
communicating with judicatory  
communicating with community*

Through these activities, people get to know each other and build relationships based on common purpose and mutual endeavor. In their role as link activities, joint events disrupt the webs of informal processes in every way—what is done, how it’s done, and who does them. Planning and implementing joint activities will involve the sharing of values, stories, and meaningful symbols and rituals, since none of these can be assumed. They can also give an indication of how it might be after an amalgamation, a peek at the promised land. This is very important, as people can rarely take a risk on things they have never experienced.

*Covenanting* or contracting was discussed earlier as an effective means of negotiating an equitable relationship between congregations with different resource bases or motivations for amalgamation. At best, there will be punctuating events, usually at times of decision-making, when covenanting occurs. Representatives from each congregation—usually members of the amalgamation steering team—describe their congregation’s investment in the amalgamation project: the attitude of members, the church’s financial situation, any impediments to the process. The next stage in the amalgamation process involves determining the questions to be asked, the information to be gathered, and the decisions to be made. Each congregation promises resources for the process, as well as declaring what it will give up in order to make room and clear the way for the implications of this next phase. Through covenanting or contracting, we become vulnerable to each other by opening our desires and dreams, freely sharing information, both giving and giving up valuable resources, and learning to receive from the partner congregation.

*Symbols and rituals* are powerful tools for a ministry of change. Given their highly associative nature, symbols and rituals will hold strong meaning and value for the congregation. They help tell us who we are and, with some attention, they can help tell us who we are to become.

For outside consultants it is usually quite easy to recognize the most important symbols and rituals in a congregation. While the worship and liturgy will have ritual and symbolic elements, the most powerful rituals and symbols might be found in other parts of our ministry. Hospitality at coffee hour, the use and care of the kitchen or library, the procedures for greeting newcomers, or counting the collection may be as powerful symbols and rituals as the way we do baptism. For congregations, these feel very familiar, the normal pattern of congregational life, so they can be difficult to identify. Leaders can begin by asking, What is our congregation known for? Who are our heroes and scoundrels? When a newcomer or guest is being introduced to the church, what are they told and shown? What would create the most anxiety in the community if it was suddenly taken away or stopped?

A congregation, renowned for its music program was considering ways to revitalize its ministry after having experienced ten years of steady decline in membership, money, and participation. For forty years this church had been well known for its excellent choirs and first-rate performances. Most of the congregation attended because of an attachment with the music. The man behind the program had been the organist and choir director for 34 years. He ruled the choir and the church with humour and an iron strong will. The congregation loved him and mourned his death six years ago deeply. Stories are still told of his famous witticisms and tantrums. The congregation funded a memorial window above the organ loft and a scholarship in his name.

The congregational leaders realized that the music program was a powerful symbol for this congregation, one that could easily be used to block an amalgamation. So, during a congregational event, the facilitator designed a timeline process where the participants were asked to tell the stories of the choir and its director from the past forty years.

They learned that many people had made their first attachments with the church, and even with the faith, through participation in the choir as a child and teenager. Through the music director's training they had learned how to sing well, to understand what they were singing about, to behave like a team, and to be responsible for always doing their best. They worked hard—expectations were high, but the rewards were great. They gave concerts with the local orchestra and every three years they went on tour. For many, the choir was the hub of their social life. Some had even met their spouses in the choir. Another interesting fact that emerged during this storytelling was that during the music director's incumbency, five choir members had gone on to become ordained ministers.

Towards the end of the storytelling session, one participant noted that while past experiences were wonderful, the choirs hadn't been attracting teens for a while; in fact, the teen choir folded nine years ago and the junior choir was struggling along with only seven regular members. The facilitator then asked the participants, "Where could we build, in our congregation today, the opportunities for young people to find all the gifts the music program gave the previous generation: the training, responsibility, sense of accom-

plishment, rewards, and team building?” This question opened an energetic discussion where a variety of options were brainstormed, debated, then prioritized.

The congregation accepted that the current music program was no longer a vibrant youth ministry, except in the nostalgia of their memories. While they were willing to try and redevelop a youth music program which could involve other instruments and different types of music, the classical choral tradition was not going to be displaced easily.

In fact, new energy for youth ministry emerged later around a totally different project. A group developed a program for young people to raise money in the congregation so that they could spend a month during the summer in Haiti helping build a church.

In this story the leaders helped the congregation identify key symbols—the music director and music program. They opened up the symbols by evoking the web of meanings and associations (e.g., the sense of accomplishment, opportunity to tour, a rich social life, a venue for expressing faith). Then they asked the critical question that challenged the congregation to think of its core values in terms of the future. This is imaginative and creative work.

- What do the key symbols and rituals mean for people? What are the stories connected to the symbols and what do they tell us?
- How can the values and meanings the symbols and rituals represent be secured and encouraged to grow within the new church? How can they be expressed and encouraged even if we can't take the ritual or symbol with us?
- Are the symbols and rituals potent for people in the new church, or is it time for them to change (e.g., in the example above, the “youth” choir that no longer attracted youth)? Are the associations we ascribe to our symbols and rituals outward looking? Will they lead us into the desired future for the new congregation?
- What is the prophetic edge? Where is God leading us next? (Opening the values and meaning of a previous generation's music symbols led the congregations to respond in fresh new directions through an outreach project that built relationships with Christians in the third world.)

The effects of working with symbols and rituals should not be underestimated. Once they are opened and understood, symbols and rituals can be used as bridges between the old and new congregations by embodying both traditional meanings and a sense of new hope and purpose for the future.

As amalgamation nears, try to mark the closings and openings of all aspects of the congregation's life and work—its worship, social, and educational groups and programs—with appropriate symbol and ritual. This will help people encounter order and significance within the process of change.

Music is the soul of a congregation. It is an inexhaustible source of meaning for us and, as such, has a very special public role during times of upheaval and change. Music is a very powerful medium because it has both personal and collective dimensions. It can carry potent individual memories and feelings often associated with transitional or formative events (e.g., weddings, funerals, the song that got you through the painful breakup). Music's collective dimension can be experienced in a congregation's repertoire of favourite hymns, the congregation's theme songs, which carry emotional meaning for the community. (Try celebrating Christmas without singing *O Come All Ye Faithful!*) In short, music can help us express that which is most difficult to express, both as individuals and as a congregation. Thus, music is highly symbolic. It is one of the most powerful symbols we have because through the act of singing or playing an instrument we make music—we participate in making the symbol itself.

For most, singing the hymns or songs of our faith is one of the few times we actually say (or sing) anything about what we believe. Through congregational singing we are forming and asserting our beliefs and faith about the church, God, and the world.

Because of its capacity to help us express that which is difficult to articulate, we can use music to give voice to what the congregation is feeling. It can also be used to help people feel some stability and security during times of profound change. One of my favourite hymns is *All My Hope on God is Founded*. I have been told that Herbert Howells wrote this hymn for his young son Michael who died young. I am inspired by his response to bereavement and grief

which is so full of trust and hope. Singing this hymn inevitably helps me feel steady, confident, and secure.

During amalgamations, leaders can identify hymns from the congregations which have special meaning or significance. These can be sung often and at special, pivotal occasions during the amalgamation to help people feel some security and stability. There are also songs and hymns composed recently which use direct and contemporary language to proclaim hope for a vibrant mission and ministry. Leaders can choose some of these which best express the new vision of the amalgamation. Together, the old and the new can become theme songs. They will help members express their feelings of grief and anticipation—saying goodbye to what is being lost and giving voice to the promise of new ministry.

Biblical and theological reflection offers a range of opportunity, which is enormous, bounded only by our imaginations and traditions. Creative theological reflection helps people connect their experience with the stories and teachings of our faith in ways that liberate energy and action.

In a particularly difficult conversation about the future of their church buildings, a member of the steering team recalled Sunday's reading from Acts 27: "It's like with Peter," she said, "the promise is that no one will be lost in the process but we're going to need to say good-bye to the boats." The group laughed and regrouped itself in the comfort of finding their emotional experience captured so well in the narrative of scripture.

The first step is to listen carefully for the feelings people are expressing through their stories, concerns, and actions. These emotions can be linked with a passage of scripture which is affectively potent enough for people to feel strong connections with what they are experiencing. Listen to Psalm 74:4–7.

Your adversaries roared in your holy place; they set up their banners as tokens of victory.

They were like men coming up with axes to a grove of trees; they broke down all your carved work with hatchets and hammers.

They set fire to your holy place; they defiled the dwelling-place of your name and razed it to the ground.

Does this passage express some of the feelings people might be having when faced with losing their building? Linking experiences and emotions with scripture can help people find words to say what they are feeling. It gives permission to do so, even when the feelings are not easy. Biblical reflection, whether it is with small groups or in sermons, is a public expression, out in the open and shared.

But it is not enough for our reflections to stay stuck in the realm of grief and loss. Biblical reflection should stretch us to discover the prophetic edge in our experiences. Where is God leading us next? Where is new, spirit-filled life? As an example, read Psalms 104, 88, 74, 73, and 23. If you read them in this order, you will find a progression. It begins in a state of stability—a feeling of “God’s in His Heaven, all’s right with the world.”

You have set the earth upon its foundations, so that it shall never be moved (Ps. 104:5).

We move into feelings of chaos, pain, abandonment and despair.

For I am full of trouble; my life is at the brink of the grave.

I am counted among those who go down to the Pit; I have become like one who has no strength (Ps. 88:3–4).

This is followed by an unresolved condition of nostalgia, deep anxiety and a cry for deliverance.

Remember your congregation that you purchased so long ago, the tribe you redeemed to be your inheritance, and Mount Zion where you dwell.

Do not hand over the life of your dove to wild beasts; never forget the lives of your poor.

Look upon your covenant; the dark places of the earth are haunts of violence (Ps. 74:2, 18–20).

The next psalm begins to look into the future with faith and hope.

I have been afflicted all day long, and punished every morning. Had I gone on speaking this way, I should have betrayed the generations of your children.

When I tried to understand these things, it was too hard for me;

Until I entered the sanctuary of God and discerned the end of wickedness. (Ps. 73:14–17).

And finally we experience the surprising newness and gift of God's peace.

You have spread a table before me in the presence of those who trouble me; you have anointed my head with oil, and my cup is running over (Ps. 23:5).

These expressions of sorrow, grief, despair, and anger turn first to hope and promise, and then to rich and blessed new life “in the face of those who trouble me.” This journey is true for individuals and for communities.

This kind of theological reflection can permeate the whole of the congregation during times of change. While it can be a model for individual pastoral counselling, it's also worthwhile for management and transition teams to incorporate biblical and theological reflection into their meetings. It helps the group feel grounded and builds meaningful relationships among members. Finally, sermons and study groups are logical venues for public theological reflection. Once again, leaders will be drawing to the surface the vulnerability and vigour of peoples' emotions, hopes, and energy for new life, and sharing these with others. For more ideas, I strongly recommend *Change, Grief, and Renewal in the Church: A spirituality for a new era* by Gerald A. Arbuckle (Christian Classics, 1991).

The link activities—joint events, working with symbol and ritual, and theological reflection—can culminate in the choice of a name for the new congregation, which will itself be a new symbol, full of meaning and associations.

## A final word on working with link activities

Working with informal process through link activities is different from providing pastoral care to individuals. While leaders in amalgamations must be in touch with the feelings and needs of people in the congregation, and will be required to provide some pastoral care along the way, their primary focus will be on the communal emotional processes: helping the members make connections between the values, meanings, and stories behind the emotions, with the tasks steering the amalgamation. The aim is to encourage a time of public reflection on the mission and ministry, which is only possible through amalgamation. At its best it is an active dialogue encompassing the past, the context for ministry today, and the possibilities for the future. It's a time to name and situate the opportunity for change within the context, identity, and evolution of the congregations, their neighbourhoods, the wider church, and the larger, historic journey of faith told in the scriptures.

People who have gone through successful amalgamations advise:

- Keep in touch. Identify people with influence in the congregation and initiate lots of personal contact. Meet informally over a meal to check-in, hear stories, opinions, and advice. Even if you don't agree, it is vital that the lines of communication remain open.
- Listen for stories. When you are with people, always listen for the stories they tell. What is motivating them or leading them forward? Where does it fit into the grieving or change process? Listen for the end of the story. What is the person's world view? Is it optimistic or pessimistic? Is it expansive or contracting? Where does the personal story connect with the stories of the faith and tradition? How might these experiences be stretched and challenged to reveal the prophetic edge?
- Provide pastoral care ministers from outside the congregations for individuals who require special care or counselling. Leaders of the amalgamation process will often not be able to be effective pastoral care ministers for individuals, especially those who are most deeply troubled by the change. First, by leading the amalgamation, leaders are often identified with the change and may not be seen as sympathetic

to people with other opinions. Second, leaders will not have the necessary time or emotional energy to provide individual pastoral care.

- Leaders should clearly define their roles and their opinions. Rumours are one of the primary tools of informal processes and they need to be countered. Be prepared to tell the story again and again of how the congregation got to the point of considering amalgamation and of your own role and responsibility in the process. Be honest about your own feelings and opinions.
- No secrets. Use processes which engage as many people as possible and which result in the public display of thoughts, ideas, concerns, and hopes. Use newsletters, bulletins, wall space, sermons, and any other public forum you have, to present information that has been collected from all aspects of the amalgamation process.

## LAST GASP OR NEW MINISTRY?

Amalgamations and mergers are being increasingly recognized as a legitimate course of action in a time when churches are experiencing decline but want to meet this challenge by building a mission and ministry for growth that will require a healthy resource base. For most congregations, considering a process of merger or amalgamation means that they are feeling a sense of impending crisis. Crises open opportunities, and opportunities invite choice. For congregations, this choice should be to find creative and life-giving ways to do ministry and be faithful and responsible stewards of their resources of people and property. The sense of crisis can easily shut creativity down by causing congregations to fall into a mire of panic, denial, and inactivity, or by jumping to a quick-fix solution. However, for congregations who are able to recognize the potential for creative change while in crisis—and who are willing to take some risks, do the work, and engage the emotional life of their communities—the intentional processes of amalgamation will offer a chance at new life filled with vision, purpose, spirited relationships, dynamic ministries, and liberated resources and energy.