



AND THE
TWO
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ONE

A Resource on Church Mergers

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A vibrant Korean American congregation merges with a predominantly White church, which once flourished in the 50's, but is now facing decline.

Two White churches merge, seeking to minimize cost and maximize ministry potential.

A predominantly White church merges with a much smaller Japanese American church that needed to move out of their old neighborhood.

Are church mergers the “solution” to congregations facing financial, ministry or property concerns? Can a merged church attract new people? Will our new church reflect the composition of the former churches, or will there be different people involved?

When I first began to study church mergers, I was quite skeptical. Would churches be able to let go of their control in order to become a new church, or would the two groups be forever arguing about who is right and who is wrong? Is it possible for churches to move from an “us and them” to a “we”?

Since the time I first began to ask these questions, I have had the opportunity to study church mergers, and serve as a pastor in a merged church for over two years. I’ve learned first hand that church mergers are not for the “faint-hearted.”

Most churches are not aware of their own unique identity and “church culture” until there is a merger. After merger, congregations discover that “the way things have always been done” is not the way the other church has functioned. Things that are “sacred” to one group may not even be known to the other.

There is a mistaken assumption that all Christians will automatically love one another because we are one in Christ. Many faithful people enter into mergers expecting to be one big happy family, only to be disappointed that the people from the “other church” have different ideas of how “family” should function.

If you are considering a merger, or in the midst of a merger, expect that giving birth to this new life together is not without pain and frustration. Some members will leave. Leadership often changes. Sharing decision making and compromising on certain issues are not easy tasks. Intentional relationship building takes time. Finding ways to clearly communicate with one another involves trial and error. It will take several years before a new congregational culture will take hold.

I have come to the conclusion that church mergers are a lot of hard work, but they can produce fruitful results. Church mergers shouldn’t be viewed as “last ditch efforts” but as viable possibilities for congregations tired of the status quo. A merged congregation can generate new life and energy toward spreading the message of Jesus Christ.

“Successful” mergers only happen when everyone involved is willing to let go of their former identities and control and allow God to help reshape and form them into a new church. The new church may not be what people expected, but it will be the result of our faithfulness and commitment.

“So if anyone is in Christ, there is a new creation; everything old has passed away; see everything has become new!” (2 Corinthians 5:17 NRSV)

“IS CHURCH MERGER RIGHT FOR US?”

Before jumping into a merger, each congregation needs to take a “hard look” at who they are and what vision(s) they have for themselves as a church. The congregations also need to assess their motivation, readiness, willingness and suitability for a merger. All alternatives to merging should be explored.

The churches considering a merger need to find out if they will be compatible. Each congregation has its own unique “congregational culture” and that includes, but is not limited to areas of worship, theology, leadership, views on women’s roles in the church, use of space and time.

I have listed some questions below that will help you get started in your discernment process. It is important to involve your Presbytery staff or representative early in the process.

Who are we now?

- What is our history as a church?
- What hopes, dreams and visions do we have?
- What are our strengths and weaknesses?
- What is our financial situation? What assets do we have?
- What is our current attendance at worship? At other church related events? Have we experienced growth or decline over the years? What has this growth or decline been attributed to?
- Does our church reflect the composition of the surrounding community?

Why do we want to consider a merger?

- Are we dissatisfied with the status quo?
- Do we have resources and gifts that we want to share or receive from another church?
- Can our mission goals be accomplished better with another church than alone?
- Can we reach new people that don’t necessarily reflect our current composition?
- Are we interested in outreach and potential growth?

What characteristics do we have that would contribute to a successful merger?

- Are we willing to take risks and be open to change?
- Can we share power, leadership and decision-making?
- Are we spiritually and financially healthy?
- Can we be patient, flexible, and willing to compromise?
- Are we willing to form new relationships?
- Do we have enough time and energy to devote to the merger?
- Do we have a commitment to grow both spiritually and numerically?
- Are the pastors engaged and supportive of the merger? Are they willing to work as colleagues?
- Are we willing to accept the “other pastor” or a pastor not known to either congregation after our church merger?
- Are we willing to accept any “fallout” from the merger?
- Are we open to learning and working together with people who are racially and culturally different than we are?
- Are we open to identifying and working on common mission goals with the other church?
- Do we have a willingness to reach people in the community who do not necessarily reflect the current composition of the church?

How compatible are we with the other church?

- Have the churches had positive or negative experiences with each other in the past?
- Are the churches theologically similar?
- What is the form and style of worship of each church? Is the music more traditional or contemporary? What style of preaching is the congregation accustomed to?
- What expectations do members have of their pastor(s)?
- Are the pastors of each congregation able to work as colleagues?
- Do the churches share similar vision and mission goals?
- How do things get accomplished in the church? How do the churches go about making decisions and completing tasks? How is information communicated?
- What kind of programs exists in each church? Can they co-exist or are combined?
- How are women's roles viewed?
- Do the churches have similar commitment to the PC(USA)?

“WHAT ALTERNATIVES DO WE HAVE IF WE DECIDE NOT TO MERGE?”

There are many other possibilities the churches may want to consider. These include, but are not limited to:

- Sharing facilities
- Yoking with another church
- Moving
- Buying new property
- Changing leadership
- Closing
- Changing mission focus

“WHAT SHOULD WE DO IF WE ARE INTERESTED IN MERGING?”

Choosing Leadership for Merger Discussions

The discernment process involved in merger discussions can be spiritually, emotionally and physically challenging. A group should be formed including equal representation of key leaders from both churches. Here are some characteristics of the leaders you may want to consider.

The leaders ...

- will be open to new ideas
- reflect the diversity present in the congregations
- are prepared to attend many meetings
- include both pastors and Presbytery representative(s)
- have knowledge of the congregation, including vision and mission goals
- are respected by the members of the congregation
- are spiritually centered
- are cross-culturally sensitive, or open to learning how to be cross culturally sensitive
- are willing to work with the staff and representatives from the presbytery
- are patient, flexible and adaptable

Initial Exploratory Meeting(s)

Congregations need to be involved in a spiritual discernment process to determine if they should merge with another congregation. These initial meetings are a time of discovery, which can include, but is not limited to:

- sharing hopes, dreams and concerns about the merger
- prayer
- discovering what commonalities and differences the churches have with one another
- group building
- sharing information about the history of each church
- bible studies
- cross-cultural learning
- sharing leadership
- open communication among the leadership and the congregation as a whole

By the end of this initial exploration, churches should have enough information in order to proceed or not proceed with the merger process.

Multicultural Mergers

It is a common understanding that Sunday morning is the most segregated time of the week. Much of the segregation in our congregations has happened as the result of prejudice or racism by the dominant culture over the years. Intentional relationship building when two churches merge, is critical, both for “mono-cultural” and “multi-cultural” church mergers. This includes, but is not limited to study, prayer, worship and fellowship with one another. Sharing of personal faith stories will also help strengthen relationships.

Culture is an integral part of who we are and how we behave. In multicultural mergers, skills need to be developed for effective intercultural communication and interaction. According to author Michael Angrosino, those truly interested in making this type of relationship work must:

- be prepared to acknowledge and confront their own discomfort and anxieties regarding differences.
- know their own culture first.
- not assume that their way of thinking or doing things is somehow “normal” “universal” or “natural.”
- get to know the culture of others.
- be aware of power inequities and histories of discrimination.
- develop intercultural competence.
- have a personal commitment to cultural diversity

“WHAT DO WE DO NOW THAT WE WANT TO MERGE?”

PC(USA) Website Resources

The Middle Governing Body Connect section of our PC(USA) website has resources listed from several presbyteries regarding church mergers (www.pcusa.org/mgbconnect). There is also a link to the Office of General Assembly’s (OGA) Constitutional Musings (www.pcusa.org/constitutionalservices/musings).

The OGA has a three-page resource for merging churches under Constitutional Musings, Note 02. It contains four primary sections.

- Section one includes suggestions for congregations considering mergers.
- Section two advises the congregations to develop a plan for union, which includes the new organizational structure, property considerations, and pastoral leadership.
- Section three highlights presbytery's role in mergers.
- Section four states the need of the Stated Clerk to follow up with the Office of the General Assembly.

The last sentence in this brief resource indicates that there is “no right way to do a merger”, as long as congregations and the presbytery follows the limited specific requirements of the *Book of Order*.

Pre-merger “laundry list”

Once a commitment to merge has been made by both congregations, the transition phase begins. During this time, a joint committee of the two congregations draws up concrete plans. This committee should be inclusive and representative of both congregation memberships. (Note: some of these areas can be considered after merger has taken place)

New Name

Until a new name is selected, the congregation cannot change any of its legal documents. Since the selection of a new name can be a very sensitive process, the congregation's needs and involvement must be taken into consideration.

Mission and Vision

Review history, mission goals and vision before merger
Affirm theological basis for merger
Formulate a mission statement for merged church
Establish short-term goals (6-12 months) for merged church
Recommendations for post merger planning and follow up (5 years)

Personnel

Review job descriptions, pay levels, contracts, and benefits
Determine staffing needed for the new church
Make recommendations regarding the funds needed for new staffing arrangement
Work with the Committee on Ministry to make the pastoral position changes

Facilities, Property

Locate and acquire new buildings if needed
Determine use of building (including use of offices)
Make modifications or repairs that need to take place in current buildings before merger
Inventory property and acquire or dispose of property as needed

Worship Services

Determine time and number of worship services each Sunday
Agree upon order of service, type(s) of music, liturgy, frequency of communion
Establish policies for weddings and funerals
Work on plans for the last worship services (as separate churches) and the first joint worship services

Programs, classes

Review and make recommendations regarding programs, fellowship groups and classes
Coordinate scheduling of church events
Review relationship with the day care center or nursery school
Cross-cultural education and sensitivity training

Finance

Review financial policies and procedures of the merged church (This includes investments, memorial gifts, foundations, special offerings, accounting and bookkeeping procedures, annual audit, fiscal year, stewardship campaigns)
Create a new joint budget
Discuss liabilities of both congregations and create a plan for dealing with them
List liquid assets

Administrative

Set the date of the congregational meeting to vote on the merger (It is helpful if the effective date of merger is January 1st for tax and other purposes)
Determine if one corporation or both corporations will be dissolved
Plan for the officers (merge, reduce or replace)
Determine nomination process for future classes of officers
Review, restructure or eliminate other current church committees as needed
Hire legal help as needed

Celebration

Plan for worship service, program, meal, and publicity of merger

Final Phase of the Merger Process

• Congregational Meeting

The joint committee first presents the Plan of Union to both sessions for their input. Each session calls a congregational meeting to approve the Plan of Union.

• Presbytery Meeting/Administrative Commission Meeting

The Presbytery (or an Administrative Commission formed by the Presbytery) meets to:
dissolve each congregation
establish the new congregation
change pastoral relationships (as needed) in conjunction with Committee on Ministry
deal with any other matters that have come up regarding the merger

• Celebration

A wonderful way to start the new merger! Why not have a worship service, great speakers, installation of pastors and officers and great food? Invite the community, Presbytery and other churches.

- **Administrative Follow Up**

There are lots of “loose ends” following a merger. Here are just a few of them.

Financial

- Open joint bank accounts
- New credit cards

Legal

- New articles of incorporation
- Tax related documents and notifications
- Updated Deed of Trust (needs to include wording “this property is held in trust for the PC(USA) or its successor denominations”)
- Statement by domestic non-profit

Services

- Review, consolidate or modify insurance policies
- CCLI Music License
- Telephone book listing
- Notify businesses of name change
- Postmaster/bulk mailing permit

New Church

- Write new by-laws
- Each bookkeeper needs to close out their own books
- Each former clerk of session needs to finalize their own minutes and attend the next review of records
- Consolidate magazine subscriptions and/change name
- Choose presbytery delegates
- Change outdoor signage
- New stationary and envelopes, address stamps
- Change answering machine message
- New Church Directory
- Website

Denominational

- Send change of service forms to Board of Pensions; report new PIN number
- Stated Clerk of the Presbytery needs to report dissolution and creation of new congregation to Office of the General Assembly and obtain new PIN number
- Photocopy session records (of pre-merged congregation) and send to the Department of History, PC(USA)

Final Reflections...

No one ever said giving birth to new life was going to be easy! It’s hard not to be “right”. It’s hard to give up control and power. It’s hard to share. It’s hard to deal with chaos. It’s hard to deal with conflict. It’s hard to reach out to people who are different than we are. Mergers take a lot of work. Just when we thought we were spiritually centered and culturally sensitive, we now find we are learning new things about ourselves, others and the love and patience of God. We thought we knew how to “do” church, only to find out that others “do” church a different way. Our church world, as we knew it, is now turned upside down.

Church mergers are very humbling experiences. Whether we were expecting it or not, mergers challenge the very core of our faith. Has our love for one another been “patient and kind?” Have we intentionally reached out and welcomed others as Jesus did? Have we discovered and embraced all the gifts that we have as one body of Christ?

With the right kind of attitude, openness, flexibility, good sense of humor and a deepening faith, mergers can be the beginning of an amazing journey. Amidst the pain and frustration are many opportunities of joy and grace made possible through Christ!

Blessings to you as you discern the next steps in your congregation’s life!

Resources for Merging Churches

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