



THE ALIGN PROCESS

*A 3-Stage Process for
Congregational Merging*



INTRODUCTION

The landscape has changed! For some congregations the most strategic current decision will be merging with another congregation into a new relationship and the creation of a new congregation. Often the choice to make this move is difficult and painful and yet the Kingdom benefit of such a choice can multiply new life and impact in neighbourhoods all across Atlantic Canada.

When a church chooses to enter into this conversation they have made a critical Kingdom choice that announces that they understand “their” church is not about “them” and that God’s Church can have multiplied impact in their neighbourhood by taking this powerful posture of humility.

While it is true that mergers (whether into one new congregation or a multi-site relationship) to be effective requires one church to be the “lead” church and the other(s) to be a “joining” church, it is not true that “joining” churches always are shrinking, dying churches on a downward trajectory.

For some, a merger is necessitated by the reality that the congregation has to some degree “lost their way” and is looking for new life. But there are also times when a congregation simply chooses to initiate a conversation with a “lead” church, not because they “see the end” but because they see the POSSIBILITIES for greater Kingdom influence TOGETHER!

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“Why merge?”

- To be better, stronger, and more effective together than apart
- To begin a new church life cycle
- To reach more people for Christ and have an increased Kingdom impact
- To better serve your local community
- To leverage the legacy and good reputation of the past
- To maximize church facilities and resources

This document outlines a **THREE stage process** for merging a congregation with another. Every situation is different and timelines and details must be adjusted given every specific context. However this process will highlight some helpful language embraced in the three stages and identify some of the best practices of others.

STAGE ONE: ALIGN

The first stage of the process is ALIGN. By this point conversation has taken place between the two or more congregations. Agreement has been reached that entering into a relationship could be valuable and that the congregations could in fact be “better together.” We have ALREADY discussed the following questions:

- *Could we accomplish more together than separately?*
- *Would our community/neighbourhoods be better served?*
- *Could the kingdom of God be further extended by a merger/site partnership?*

The ALIGN stage is “dipping your toe in the water”. During this 8-12 month phase the congregations begin to “align” some significant areas of ministry. It will allow both congregations to experience the other and begin to clarify if DNA and culture can be matched. In large part the joining congregation will embrace some key areas (“critical linkages”) of the lead church. It makes sense to try this for a ministry year in many instances (September-through May).

The strength of this stage is that it really is a no-commitment stage. It is an experimental, pilot project. While you will ALIGN some significant areas of ministry for a period of time, at the end of that period either side is free to say that it is or is not working.

In large part it is like the “dating” phase of a relationship where the two people are getting to know each other to see if there is the possibility of a long term relationship based on a common vision and values.

Beyond that, during “ALIGN” the impact on church finances/budgets in this stage will be minimal. Besides the costs of ministry that would occur anyway, we anticipate the financial costs to be a non- factor because ALIGN is more focused on building ministry relationships than shifting program costs.

Some key “critical linkage” areas of ministry to ALIGN could be:

- **Weekend worship and preaching.** The joining church can align their weekend themes, preaching series with the lead church. Additionally there could be a rotational preaching pattern or potentially some vid-eo teaching that can be utilized as well. Also, sharing worship bands and musicians might also be a possi-bility. Of CRITICAL NOTE, during this ALIGN stage it is important to begin to shift the joining churches culture toward the culture of the lead church. In the end, if a full merger happens, there will be ONE CULTURE.
- **Leadership training:** Small group leaders, children’s workers, youth leaders, worship, etc ... can begin to share training as ONE church. This can be a huge benefit in not duplicating training and in fact increasing the quality of training for many churches that can struggle in this area.
- **Children’s Ministry:** Aligning the children’s ministry in terms of curriculum, themes and model of minis-try is healthy to do at this point.
- **Youth Ministry:** Perhaps sharing a youth ministry if geography allows.
- **Small Groups:** Aligning the small group ministry as ONE ministry is helpful to experiment with at this point. Shared training. Shared accountability.

- **Communications:** During the Align stage it also could be helpful to begin merging some of the communication streams so that people can begin to experience what it would like as ONE church. Media slides, bulletins/folders/email templates/signage/newsletters. Beginning to shape the worship environments to have all similar flavor, feel and culture can be important at this point. For example if folks from the lead church consider “shifting” to the new site for a period of time, it can be important for them to feel that the DNA and worship environment and culture is the same.

The ALIGN stage is a critical time to experiment and “push to the edges” a bit to see if the merge can be a good fit.

The goal of the ALIGN stage is to expose the “joining” church to the culture and leadership of the “lead” church. This first stage will help both churches to solidify a desire and viability to continue together on this merger path. The “critical linkages” will help people see the benefits as well as the SHIFTS that will occur if the full merger occurs.

Implementing these strategic actions will require the joining church to take the first steps in giving up a measure of independence and be willing to enter into a new relationship that requires trust, partnering, following and taking new risks. It is clearly understood that both congregations are still autonomous in the ALIGN stage we acknowledge that these strategic recommendations will be done in a spirit of care, cooperation and collaboration.

STAGE TWO: FUSION

Following the ALIGN stage, the congregations, if desired can continue and move into the FUSION stage. At this point, the congregations will express their desire to continue. ALIGN went well. Benefits were experienced. Both feel that they are “better together”. In fact, it could be that even during the ALIGN stage some of these FUSION discussions could be had with the leadership team, simply to move the process along.

The three big questions:

1. **Is this merger possible? EXPLORATION (dating).** The ALIGN stage helps to answer this question.
2. **Is this merger feasible? NEGOTIATION (courtship).** This is in large part the FUSION stage. The compatibility of the congregations must be determined and some of the organizational details and realities addressed..
3. **Is this merger desirable? IMPLEMENTATION (engagement/wedding).** This is the UNITE stage where a process will be put in place to merge the two into one. It is not so much asking the congregations to join BUT rather they are committing to bold, exciting, biblical, KINGDOM vision.

During the FUSION stage, discussions begin surrounding financial, property, organizational and governance structures. This stage can be done in 3-6 months. The goal of FUSION is move the “joining” congregation into a merged congregation.

At this point the leadership team can work through the “25 Essential Questions” that should be addressed to uncover any “sticking” points that might surface. As in marriage, the more commonalties and shared convictions, the greater the chance of success!

STAGE THREE: UNITE

During the UNITE stage there is in essence a wedding that takes place. The “joining” congregation is merged and the “two become one”. In all likelihood this is a 2-3 month process.

This stage involves the name change, legalities, transfers of title, governance shifts, financial/budgeting shifts, necessary renovations beginning.

A FINAL THOUGHT

Jesus said in Luke 9:24 - If you try to hang on to your life, you will lose it. But if you give up your life for my sake, you will save it. The focus of a merger is not about “losing our church” but instead gaining greater Kingdom potential and impact. It asks, “What are we prepared to do for “Jesus’ Church?” As churches consider taking the first steps into these conversations, the hope and prayer is that a clearer vision that we can accomplish more kingdom ministry together than by remaining separate will rise to the surface!

This Align document and the language surrounding the three stages was originally shaped by The Journey Church (Moncton NB) and Rev. David Morehouse for a specific merger conversation. It has been reshaped and rewritten more generally for wider usage by Rev. Kevin Vincent.

FUSION: IS THE MERGER FEASIBLE? (25 ESSENTIAL QUESTIONS)

DOCTRINE & GOVERNANCE

- Are we compatible in doctrine? Are there differences?
- Are we compatible in governance? Are there differences? Does governance need to change for the new congregation?
- Are we similar in our affiliations? Are there differences?
- Are we similar enough in our DNA to merge? Where does our DNA differ? Are there potential tension spots?

MISSION, VISION & PHILOSOPHY

- How does each church answer, why do we exist? What is our fundamental MISSION? The more similar the foundational purpose, the greater the success.
- What is the vision for a preferred picture? If we succeed what will our church look like in 10yrs? Are we creating and embracing vision together or adopting the vision of one congregation?
- What core values guide the direction and practice of the church? What REALLY matters to us? How similar or divergent are those values?
- Strategy: What is the ministry strategy of each congregation? Are you attracted or repelled by the other's strategy?
- Worship Style: How similar or different? What are the individual styles? Will one congregation embrace the other style? Will a new style be embraced that is tied to the vision and values of the new congregation?
- Preaching: Are styles similar? Expectations similar?
- Membership: What are the different requirements for membership? What will the new requirements be?
- Programs: What are the non-negotiable programs? What are the healthy ministries? What programs will end?
- Budget: Budgets reflect a church's priorities? What do you learn about each other from the budget? How similar is the budget DNA? Potential stress points?

STAFFING & BOARDS:

- Expectations: Is this a merger of equals? Is one the lead church? Is one the joining church?
- Lead Pastor: Will a new Lead pastor for the congregation be sought? When will that process begin? What is the process? What will the staff scenario look like until a new lead pastor is in place?
- Associate Staff: What will be the staff formation? Will current staff remain in a certain role? Will new staff be necessary?
- Boards and Committees: What boards and committees will remain in the new congregation? Which might be eliminated? How will the new be formed and who will serve on them?
- Missions: What current missionaries/organizations are being supported by each congregation? Once the merger is complete which will remain?

LEGAL

- Church Name: What will be the name of the new congregation?
- Voting: How will the decision to merge be decided and by whom? Will each congregation vote individually? What percentage is necessary? What percentage are we willing to accept to merge?
- Dissolution: What is the dissolution process for the congregations? What process is necessary for the newly formed congregation?
- Property, Land, facilities: Will the new congregation be joining property, land, facilities?
- Assets and Liabilities: What assets does each congregation bring?
- Debt: What debt does each bring to the merger?
- OTHER POTENTIAL ISSUES or LANDMINES? Are there deal breakers?

CRITICAL NEXT STEPS

1. Following a discussion on the key issues, are we in agreement that a merger is feasible and in fact preferable for benefit of God's kingdom? Are we excited about the possibility of the new congregation being formed? Are there any remaining hesitations or concerns?
2. Timeline: What is our timeline for the IMPLEMENTATION (engagement) part of the process?
 - Prepare FAQ sheet
 - Set "Town Hall" meeting dates. Who will lead those?
 - Communicate those meetings. What is our communication strategy?
 - Set vote date for each congregation.
 - Determine and establish the post-merger leadership team for the new congregation.
 - That team will establish an integration and implementation plan.

ADDITIONAL RESOURCES

Visit atlanticbaptist.ca/churchlink for additional information and examples, including written and video stories from other churches in Atlantic Canada.