Seven Key Steps in Planning and Implementing a Successful Church Merger

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SEVEN KEY STEPS IN PLANNING AND IMPLEMENTING A SUCCESSFUL CHURCH MERGER

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The hypothesis of this project is that merging of two churches is a viable option for some congregations who are seeking to advance the kingdom of Christ. However, an analysis of obtainable literature reveals that there is little material available to assist churches that are interested in such a pursuit. This project will provide churches with an effective process of determining, implementing and maintaining a successful church merger. Utilizing information from Scripture, current trends, advice from church growth experts, observations of actual church mergers, and a post-merger survey, this project will develop practical steps to navigate churches through a successful merger process.

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# Contents

Abstract ......................................................................................................................... ii

Acknowledgments ........................................................................................................ iii

Contents ......................................................................................................................... iv

Chapter 1: Introduction ................................................................................................. 1

  Statement of the Problem and Limitations .................................................................. 1

  Theoretical Basis ........................................................................................................... 3

  Statement of Methodology ......................................................................................... 5

  Review of Literature ...................................................................................................... 7

  Review of Scripture ..................................................................................................... 16

Chapter 2: The Imperative of Church Mergers .......................................................... 20

  The State of the Church ............................................................................................... 20

  Renewal Trends ............................................................................................................ 23

  Church Mergers .......................................................................................................... 24

Chapter 3: The Merger Options .................................................................................... 28

  The Blended Merger Option ....................................................................................... 28

  The Acquisition Merger Option .................................................................................. 30

  The Multi-Site Merger Option ....................................................................................... 31

  The Franchise Merger Option ..................................................................................... 32

  The Option Decision .................................................................................................... 34
Chapter 4: The Church Merger Survey ................................................................. 37
  Research Participants .................................................................................. 37
  Research Methodology ................................................................................ 37
  Research Results ........................................................................................ 38
  Research Observations .............................................................................. 51

Chapter 5: The Seven Steps to A Successful Merger ........................................... 61
  Step 1: INSPIRE - A Clear Vision ................................................................. 61
  Step 2: INVESTIGATE - Initiate Contact ................................................. 68
  Step 3: IDENTIFY – Mission, Affiliations and the Non-Negotiables .......... 77
  Step 4: INSTRUCT - Define the Merger Process .................................... 86
  Step 5: ILLUSTRATE - Determine the Ministry Model and Leadership Structure .......... 91
  Step 6: IMPLEMENT - Work Through the Legal Issues and the Vote ......... 96
  Step 7: INTEGRATE - Blend the Two Congregations ............................ 100

Chapter 6: Conclusion .................................................................................... 104

Bibliography .................................................................................................. 108

Appendix A: Church Merger Survey ............................................................... 115

Appendix B: Church Merger Survey Results .................................................. 118

Appendix C: Worksheets ................................................................................ 122

IRB Approval .................................................................................................. 130
Chapter 1

Introduction

Statement of the Problem and Limitations

The conditions for many American churches are far from ideal. According to research by the Malphurs Group, “80-85% of churches are plateaued or declining.”¹ This reality is noted by authors Jim Tomberlin and Warren Bird who write that, “roughly 80 percent of the three hundred thousand Protestant churches in the United States have plateaued or are declining, and many of them are in desperate need of a vibrant ministry. Among the 20 percent of growing congregations across the United States, many are in desperate need of space.”²

Today, a majority of congregations are facing serious struggles with stagnation or decline. Unable to attract new members, numerous churches are dealing with an aging congregation, underutilized facilities and a shrinking budget. As the attendance numbers gradually drop, the situation becomes less hopeful. Thom Rainer has studied this decline and states:

> Often the decline is in the physical facilities, but it is much more than that. The decline is in the vibrant ministries that once existed. The decline is in the prayer lives of the members who remain. The decline is in the outward focus of the church. The decline this in the connection with the community. The decline is in the hopes and dreams of those who remain.³

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The minority of churches experiencing growth face a very different problem, the need for additional space for ministry. Growth is good; however, it can produce a negative effect if sufficient space is not provided in a timely manner. “As a general rule of thumb, when the pews are 80 percent full, the church will not grow.” Economic challenges often prevent the growing church from addressing the space issues. If not corrected, the momentum of their growth will decrease.

These situations have led church leaders to consider various options when dealing with their problem of decline or space. In the past, most leaders choose to continue their current course. They mistakenly believed if they just worked harder, prayed more, or persevered, the church would eventually overcome the problem. Sadly, such action usually resulted in the eventual closure of the church. Statistics show that, “3,500 churches close their doors every year.” One of the options now gaining popularity is that of church mergers.

According to the Leadership Network, “2% of America’s 300,000 churches have been involved in a merger and that 8% are looking into the possibility of a future merger.” While church mergers are something that leaders are increasingly considering, information on the church merger process is very scarce. The lack of available information may account for the fact that, “nine out of ten mergers typically fail. If numerical increase is expected, most mergers will not prove successful.” When leaders do not know how to lead, the outcome can be devastating.

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This thesis will examine and evaluate the merger processes that have been used by churches. Both successful and failed models will be considered. For the purposes of this thesis, the specific research will be restricted to churches used in the conducted survey and general data obtained from sited church merger sources. The paper will also address the various types of mergers being pursued such as strategic, survival or multi-site. The results of this analysis will become the conclusion of this paper, as it will seek to identify which merger practices were beneficial and which were unhelpful. The constructive practices will be organized into various steps that detail the progression of a successful process.

Theoretical Basis

What exactly is meant by a church “merger?” According to the Merriam-Webster's Collegiate Dictionary, the word merger is defined, “to cause to combine, unit, or coalesce; to become combined into one.”8 The Cambridge Dictionary states the meaning of merger as, “the combining of two or more companies or organizations into one.”9 The Leadership Network explains a church merger as: “…one church (the lead church) absorbs another (the joining church). The lead church is usually the larger congregation. The churches become one to achieve a common purpose: working together as a vibrant, healthy expression of Christ's body, the church.”10

Although the specific word “merger” does not appear in the Bible, the concept of joining two separate entities together as one is frequently presented throughout Scripture. Biblical words

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such as *joined* (Matt 19:16), *unity* (Ps 133:1), *reconcile* (Eph 2:16), *one* (John 17:11), *grafted* (Rom 11:23-24), and *married* (Rom 7:4) all suggest the idea of merging. In fact, the Bible is filled with accounts of the Lord uniting people as a nation and bringing them into connection with Himself and one another.\(^{11}\)

In the beginning, God created Adam and later stated, “And the Lord God said, “It is not good that man should be alone; I will make him a helper comparable to him.” (Gen 2:18). God then created Eve and joined them together in marriage proclaiming, “Therefore a man shall leave his father and mother and be joined to his wife, and they shall become one flesh” (Gen 2:24). Marriage from these passages could be viewed as a merger of the lives of a man and woman.

As King Solomon pondered the meaning of life and wisdom, he shared his insight to the value of joining together with another. Such a merger of two individuals can bring collective benefits that cannot be enjoyed alone:

Two are better than one, Because they have a good reward for their labor. For if they fall, one will lift up his companion. But woe to him who is alone when he falls, For he has no one to help him up. Again, if two lie down together, they will keep warm; But how can one be warm alone? Though one may be overpowered by another, two can withstand him. And a threefold cord is not quickly broken. (Eccl 4:9-12)

The Lord Jesus desired that the church would be united together as He and the Father were one. In His high priestly prayer, Jesus appeals to the Father by saying:

that they all may be one, as You, Father, are in Me, and I in You; that they also may be one in Us, that the world may believe that You sent Me. And the glory which You gave Me I have given them, that they may be one just as We are one: I in them, and You in Me; that they may be made perfect in one, and that the world may know that You have sent Me, and have loved them as You have loved Me. (John 17:21-23)

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\(^{11}\) Exod 33:16; Ps 2:8; Isa 14:1; Mal 1:11; Mark 11:17; John 11:52; Acts 1:8; Col 1:27; Rev 5:9-10 (NKJV)

Unless otherwise noted, all biblical passages referenced are in the *New King James Version*, (Nashville: Nelson Bibles, 2006).
Luke says us in the book of Acts that it was Christ’s intent to bring together people from all nations through the witness of the church. Prior to His ascension, Jesus told His disciples, “But you shall receive power when the Holy Spirit has come upon you; and you shall be witnesses to Me in Jerusalem, and in all Judea and Samaria, and to the end of the earth” (Acts 1:8). The powerful message of the church would reach beyond the geographic boarders of one people and would extend outward to encompass the entire world. The Apostle Paul would declare that God has “grafted” the Gentiles into the same vine as the Jews (Rom 11:17-18).

When seeking to illustrate the nature of the church, the Apostle Paul said, “For by one Spirit we were all baptized into one body—whether Jews or Greeks, whether slaves or free—and have all been made to drink into one Spirit” (1 Cor 12:13). The Lord took people from a diverse ethnicity, social standing, and religious belief and combined them into one body, the church. Scripture demonstrates two separate elements can be combined to produce a single unit that is better, stronger, and more productive than either individual entity. This biblical principle of merging can be experienced in marriage, friendship, redemption, and the church. Therefore, it can be observed, “merging is congruent with the heart of God, the principles of Scripture, and the idea of more effectively using the resources God has provided.”

Statement of Methodology

Having stated the problem and the theoretical basis for this paper, the specific methodology of the thesis will be outlined. This project then will consist of an introduction, four chapters and a conclusion. These chapters will be presented in sequence: (1) The current conditions creating the need for mergers. (2) Observations and insights taken from various merger attempts. (3) Post-merger research data collected from churches who responded to a

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merger survey. (4) The development of practical steps that should be taken for a successful merger. Below is the chapter outline for the project and a summary of each chapter:

Chapter 2 – The Imperative of Church Mergers

This chapter will address the current condition of churches in North America. It will demonstrate that the present decline in church growth has prompted many leaders to consider the benefit of a merger. Renewal trends and various merger options that include, but are not limited to multi-site, will be explored.

Chapter 3 – Merger Options

This third chapter will detail the four merger options available for churches considering a merger. The purpose of each merger model as well as the unique elements of the types will be explained. Lastly, the issues surrounding the motivation for the merger decision are studied.

Chapter 4 – Results from Church Survey

This chapter will share the details from the research project conducted by the author. A description and rationale of the project will be provided as the results from the data collected. An evaluation of the data will determine which merger practices that churches used had a positive effect and those practices that were not helpful.

Chapter 5 – The Seven Steps to a Successful Merger

Chapter five is the final chapter. This chapter will outline the seven vital steps that should be taken that lead to a successful church merger. This chapter contains the main component of the thesis. These practical steps are listed in sequential order and include to: Inspire, Investigate, Identify, Instruct, Illustrate, Implement and Integrate.
Chapter 6 – Conclusion

Finally, the conclusion will demonstrate that the merging of churches is a viable option for some congregations who desire to advance the kingdom. This project will provide churches with an effective process of determining, implementing and maintaining a successful church merger. The process will be developed into seven practical steps that will guide churches in navigating toward a successful merger.

Review of Literature

This thesis will utilize a number of reference sources to substantiate its statements. Listed below is a collection of the literature that will be used throughout this project.

Leadership / Vision

Visioneering by Andy Stanley details how successful leaders communicate a compelling vision. Stanley states that, “vision brings your world into focus.”\(^{13}\) A merger is a visionary act that must capture the mind and hearts of the membership. This vision must have clarity and be effectively communicated if it is to be embraced. The book explains how leaders can define, describe and deliver God’s vision for ministry.

How Successful People Lead by John C. Maxwell explains the levels of leadership and how they operate.\(^{14}\) Effective leadership is essential for a successful merger to take place. In such an effort, there must be strong biblical leadership to guide the people. Simply having an inspired idea or good motives is insufficient to lead a group of people through the merger

\(^{13}\) Andy Stanley, Visioneering (Sisters, OR.: Multnomah Publishers, 1999), 14.

\(^{14}\) John C. Maxwell, How Successful People Lead: Taking Your Influence to the Next Level (New York, NY: Center Street, 2013).
process. Maxwell states, “Good leaders do not lead everyone in the same way, because every person is different and you’re not on the same level of leadership with every person.”

Leadership is not limited to a large church setting. The context of a smaller ministry will be considered. There are practices used in the operation of a large church that cannot be duplicated in a smaller congregation. In his book, *The Healthy Small Church*, Dennis Bickers explains that leading a small church ministry requires a unique level of leadership skills. The dynamics megachurch are many times incompatible with that of a small congregation. Bickers states when small church pastors ignore this reality, “Often these leaders experience more disappointment than growth…”

**Types / Categories**

In his book, *A New Kind of Church*, seminary professor and leadership expert, Aubrey Malphurs, details the kinds of church models that are being developed and how leaders should evaluate their chosen model. This information can guide leaders as they seek to blend the congregations into one unified body.

One of the most frequent reasons for church mergers today is the creation of a multi-site campus. Authors Groff Surratt, Greg Ligon and Warren Bird, in their book, *The Multi-site Church Revolution: Being One Church--in Many Locations*, outline the various reasons churches

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17 Ibid., 14.

pursue this type of merger. The book then offers specific action steps that leaders should follow as they work through the process.19

Elmer Towns and Ed. Stetzer explore the reality of changes within the church in their book, *11 Innovations in the Local Church*.20 The book provides insight and analysis into the popular trend of the multi-site church.

**Processes**

In most mergers attempts, one congregation will be larger than the other.21 Jeff Brumely, assistant editor for Baptist News Global, states, “mergers that fail usually do so because somebody doesn’t want to give up control.”22 This article explains how to work through the potential obstacles and issues that are inherent when a larger church and a smaller church attempt a merger.

Even under the best conditions, church mergers often fail. According to research by Pastoral Care, Inc., there are a number of the reasons why church mergers fail.23 Leaders need to be realistic about the pitfalls and honest about their motives as they enter into a merger. The difficulties should not limit a leader’s faith but rather, they should provoke careful and prayerful planning.

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Adjustments and compromises are a normal part of the merger negotiation process. However, there should be certain issues that each congregation considers to be non-negotiable. Pastoral Care Executive Director, Jim Fuller, identifies seven potential “dealbreakers” that the two merging congregations must navigate through if the merger is to become successful.24

Attorney and Minister John Joseph, notes that a struggling church has three options to survive. One of these options for survival is a merger. His article outlines the process of a church merger along with the benefits and drawbacks of a merger.25

Authors Mark DeVine and Darrin Patrick, explore the practical possibility of promoting growth in dying churches through church mergers. Their book, Replant: How a Dying Church Can Grow Again, discuss the causes of church decline, the need for leadership and examples of actual church mergers.26

In his book, Vital Merger: A New Church Start Approach That Joins Church Families Together, Dirk Elliot offers insight into both traditional mergers as well as the methodology of new church plants. Innovative concepts for mergers are also presented as well as checklists, polls and sample documents.27

Church growth strategist, Jim Tomberlin, details his interview with a pastor who completed a church merger. The article chronicles both what was done right and what would

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have been done differently if it were possible. His interview offers a candid perspective from a pastor who completed the merger process.\(^{28}\)

*Mergers: Combining Churches to Multiply Disciples* by Matt Rogers is project written in conjunction with the church planting efforts of the North American Missions Board of the Southern Baptist Convention.\(^{29}\) This book provides a guide for how church plants and existing churches can and should consider a merger. Rogers details his steps in the merging of Covenant Grace Baptist Church and Renewal Church in Greenville, South Carolina.

Pastor and seminary professor, David Fletcher, outlines the process of a church merger in relational terms. Describing the merger as a couple to be married, he uses such terminology as he lists the various stages and steps that lead toward the consummation of the merger.\(^{30}\)

As previously cited in this paper, church mergers have a high risk of failure. Stephen Gray, who serves as the Church Planting Director for the Western Region of the Free Methodist Church, lists the three main reasons why most church mergers will fail.\(^{31}\) By identifying the most common reasons for merger failure, leaders can give careful attention to these critical areas.

In their book, *How 300 Churches Turned around and Yours Can Too*, Ed Stetzer and Mike Dodson address the reasons for the decline and stagnation of church growth. They offer a


strategy for recovery that involves leadership, vision and specific changes that align with the church merger process.  

The most comprehensive book today on the topic of church mergers is, Better Together: Making Church Mergers Work. Authors, Jim Tomberlin and Warren Bird, thoroughly cover every essential aspect of the topic. Their book also includes examples from actual mergers as well as research information.

In his doctoral thesis at Liberty University, Samuel Holdbrook-Smith, details a strategy that he used as he merged two United Methodist Churches. His account of the actual merger of these churches provides insights about strategy prayer, leadership development, and God’s vision. Although this thesis project will deal with Baptist Churches, many of Holdbrook-Smith’s Methodist methodologies will have direct application to the process put forth in this work.

Current / Future Trends

The Director of Content Development for The Unstuck Group, Jason Vernon, interviews author and growth strategist, Jim Tomberlin. In his interview, they discuss the current trends in church mergers. The observations in this interview will be helpful for those considering leading their church into a merger.

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33 Tomberlin and Bird, Better Together.


Pastor Eric Loyer, of Remedy Church, sees a growing trend developing in churches attempting mergers. He evaluates both the dangers and benefits of mergers and also seeks to predict if mergers will eventually become as popular as church planting seems to be today.\textsuperscript{36}

Ann Michel, associate director of the Lewis Center for Church Leadership, notes the growing increase in church mergers. Research shows “…a trend since the 1990s toward a greater number of mergers. Two percent of all Protestant churches in the U.S. merge each year. Another five percent say they have talked about merging in the future.”\textsuperscript{37}

Mergers are occurring among churches of all sizes and types in all kinds of settings. In an article for MultiSite Solutions, Jim Tomberlin provides statistics for demonstrating that church mergers are currently on the increase. The data offers three main explanations as to why the numbers of church mergers have increased.\textsuperscript{38} The increase can also be connected to one of the most popular reasons for church mergers today, that being to produce a multi-site. In another article on the website, “Tony Morgan Live,” Tomberlin lists nine trends that are predicted for 2015 in which many of the trends relate directly to church mergers.\textsuperscript{39}

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Christian Post reporter, Audrey Barrick, chronicles the journey of two congregations that merged in order to make a greater impact on their community. The article illustrates their motivation that led to the merger as well as demonstrates a current trend among churches.40

The North American Mission Board of the Southern Baptist Convention provides some statistical information on plateaued and declining churches.41 In this published article by Jeff Christopherson, both the documented condition of Southern Baptist churches as well as the available response options are presented.

Legal / Financial

Brotherhood Mutual offers advice to church leaders who are concerning the liability issues of a merger. Written from a church insurance perspective, this information provides valuable legal guidance that churches must not ignore as they navigate through the merger process.42

Attorney Thomas Rose writes about some of the specific legal aspects that are often associated with church mergers. His legal advice deals particularly with the legal difference in a church merger as opposed to a church acquisition.43


The legal and financial aspects of a church merger can be complicated. Attorney H. Robert Showers, Jr., lists the legal categories of mergers and options when moving through the merger process.\(^{44}\)

Travis Wallace, church bookkeeping expert, shares some recommendations regarding combining the finances of churches that are involved in a merger. He lists some specific steps that should be taken as well as significant questions that must be answered to avoid financial problems.\(^{45}\)

**Essential Beliefs / Philosophy**

There are certain elements that must not be sacrificed in a merger agreement. Church Management consultant, Patricia Lotich, identifies ten specific areas that each church must give careful consideration. She asserts that how these essentials are set up will determine the direction of the new merged congregation.\(^{46}\)

Doctrinal integrity must be an area in which there can be no compromise. John MacArthur in, *Reckless Faith*, examines the contemporary shift in churches to abandon essential doctrines. Merging churches must be certain that the two congregations are in agreement regarding the essential beliefs that define their faith.\(^{47}\)


It is essential to clarify what constitutes the gospel. The merging congregations must clearly define what each of them consider is the message and means of salvation. Merging churches also should be transparent regarding how committed they will be to reach the lost with the Gospel. R.C. Sproul writes about the contemporary controversies that confuse or else compromise the Gospel message.48

Elmer Towns in, *What's Right with the Church*, writes about the critical issues that the church must correctly embrace. It will be essential for the merging churches to be united in these essential areas if the merger is to successfully accomplish the church’s mission and vision.49

**Review of Scripture**

A biblical context will frame this project. The following Scriptures will be used to demonstrate the relevance of the Bible to the topic of this thesis.

**Psalm 133:1**: The Psalmist celebrates the blessing of unity. In a church merger, both congregations are ultimately seeking to become one unified fellowship. Such true unity should be celebrated by God’s people for God is one (Deut 6:4).

**Proverbs 29:18**: The wisdom of Proverbs instructs us that people perish without vision. One of the key elements for a successful church merger will be for the leaders to cast a bold vision. This vision must be connected to the mission of reaching the lost lest they perish (2 Pet 3:9).

**Ecclesiastes 4:9-10**: God often joins together two things in order to make one better thing. The combined strength of two can be more powerful and beneficial than a single entity. In

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a successful church merger, the combined congregation should have the opportunity to accomplish what neither individual group could achieve on its own.

Amos 3:3: In order to become a unified people, there must be a oneness in purpose and faith. The merger objective for both congregations must be agreed upon if the people are to be integrated into one body (1 Cor 12:12).

Matthew 28:19-20: The Lord Jesus gave to the church the Great Commission. This mandate is the basis for all ministry and mission. The church is called to make disciples of every people group in the world. Therefore, the ultimate purpose of every merger should be to join together to fulfill the Great Commission.

Mark 11:17: The concept of a merger is seen throughout the Bible through God’s plan of redemption. Jesus’ statement reminds us that God desires to “merge” all people, of all nations, in worship of Him (Rev 7:9).

Mark 16:15: In Mark’s record of the Great Commission, the church is commanded to preach the gospel unto all the world. All people need salvation. Clarity of the gospel and obedience to the mandate must be a part of the purpose for any merger.

John 8:29: Jesus announces that the motivation for His ministry is to please the Father. The merger process must be done in such a way that the process and results please God. The church fails unless God is pleased, regardless of the outcome of the merger.

John 17:22-23: Jesus states that one of the visible signs that the church is of God, is when true unity is observed. One of the motivations for a merger, should be display biblical unity to the world (John 13:35).

Acts 2:41-42: A foundational element of the early church’s ministry was the content of their doctrine.
“The word, ‘doctrine,’ comes from the Greek word, ‘didaskolos,’ and it basically means ‘teaching.’ It is used many times in the New Testament. Doctrine is extremely important in Christianity. By it we know who God is, what He has done, what the Trinity is, the deity of Christ, His resurrection, salvation, justification, etc. Doctrine is what defines the who's and what's of Christianity.”

A church merger should not result in compromising essential doctrine. Therefore, it is vital that each church identify their core doctrines.

**Romans 1:16:** The Apostle Paul affirms that it is the acceptance of the gospel that brings about salvation. The merging churches must be united in the meaning and means of salvation. The proclamation of the Good News must be a priority for the combined congregations.

**Romans 11:17:** Paul illustrates how God grafted the Gentiles into His plan even though they were not of Israel. It was God who chose to “merge” the Jews and Gentiles into one body. In this action we see the concept of mergers in Scripture.

**1 Corinthians 15:1-4:** Paul provides an explanation for the use of the term “gospel.” He clearly states that “to deny the resurrection of Christ specifically…amounts to a rejection of a core tenet of the gospel…” If the merger of the church is to result in biblical unity, they must both be in agreement as to what constitutes the gospel message.

**Ephesians 2:15-16:** In Christ, both Jews and Gentiles find reconciliation with God and with each other. This is another example of God merging things together.

**Ephesians 4:4-6:** Paul teaches the Ephesian church the significance of unity. He presents a list of “ones” as he emphasizes the unity of the Father, Son, Spirit and Church. Mergers ought to strive for the result of two congregations becoming one church.

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**Ephesians 4:11-13**: God has given to the church gifted men who are to use their gifts to equip the membership to accomplish the work of the ministry. This endeavor must seek to unify the believers in the faith. The merger process should result in a greater unity of faith and ministry.

**Colossians 3:11**: Paul says that in Christ, there is no longer any distinction of people even though they are indeed different from each other. They have all been “merged” into one body. Mergers must consider the differences in each congregation and seek to blend them into one body.

**Philippians 2:2**: Paul’s joy was seeing the church unified by love in its purpose and mission. Likewise, the result of the merger should be that the two congregations become one church, united by love and in one accord in purpose and mission.

**2 Timothy 4:2-4**: Timothy is exhorted by Paul not to compromise sound doctrine. The merging churches must identify their non-negotiable doctrines and determine to make them a core condition of the merger.

**1 Peter 5:5-6**: Peter writes about the need for humility within the church. Humility is a needed commodity throughout a church merger. Change can be difficult and frightening. The parties involved in the negotiations must exercise patience, kindness and display a humble spirit.
Chapter 2
The Imperative of Church Mergers

This chapter will consider the present state of North American churches and conclude if the need exists for mergers. What is the status of the American church? Do these conditions suggest that mergers are a valid response? What trends related to mergers can be observed?

The State of the Church

The current condition of churches in North America could be described by the opening of Charles Dickens novel, *The Tale of Two Cities*. The story begins:

It was the best of times, it was the worst of times, it was the age of wisdom, it was the age of foolishness, it was the epoch of belief, it was the epoch of incredulity, it was the season of Light, it was the season of Darkness, it was the spring of hope, it was the winter of despair, we had everything before us, we had nothing before us, we were all going direct to Heaven, we were all going direct the other way…

Dickens was comparing the period of the French Revolution to that of his own day in 1859. This was a time of growing secularism in science and politics as Charles Darwin published his *The Origin of Species* and John Stuart Mill, the atheist and utilitarian, published his essay “On Liberty.” God and religion were being rejected by many. The long-accepted truths of the Bible were being questioned and ridiculed. It was the worst of times.

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53 In the nineteenth century, Darwin set forth his theory of evolution by natural selection. His theory challenged the common belief that life was the result of divine intervention. Instead, Darwin posited that life was a result of naturalistic processes. His theory was accepted by many as the scientific mechanism for evolution. See Charles Darwin, *The Origin of Species*, (Washington Square, N.Y.: New York University Press, 1988).

54 Mill was one the most influential philosophers of the 1800’s. He asserted that society should focus on human happiness instead of “natural rights.” He sought to restructure social and political institutions that had based their laws on biblical morality. See John Stuart Mill, *On Liberty*. (New York, NY: LG Classics, 2016).
At this same moment of spiritual darkness, there was a great spiritual awakening taking place. This was a time when in London, Charles Spurgeon led “the largest evangelical church in the world.” Each week thousands of people would pack the sanctuary to hear Spurgeon preach the Bible. Also during this period, George Müller was caring for hundreds of England’s orphans. Never asking for funds from others, Müller depended upon God to provide all his needs through prayer. Hudson Taylor had just launched his great missionary work. Taylor took the gospel message to the people of China and eventually established the China Inland Mission. It was the best of times.

The same could be said of today: It is the best of times and the worst of times. The latest statistics reveal that most American churches have 80 or fewer in attendance each week which is down from the 2010 (105 average attendance) and 2005 (129 average attendance) statistics. This condition is echoed by church consultant, Aubrey Malphurs, “The State of the American Church concerns me. 80-85% of churches are plateaued or declining.” The North American Mission Board reports that of today’s Southern Baptist Churches, 10-15% are healthy and

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56 Müller pastored in Bristol, England for over 66 years. During this time, he built five large orphanages in which 10,024 orphans were cared for during his life. He never made requests for financial support, nor did he go into debt, but choose to depend upon prayer to supply his needs. See George Müller and Diana L. Matisko. The Autobiography of George Müller (Springdale, PA: Whitaker House, 1984).

57 Taylor was a pioneer in missionary work in China. He founded the China Inland Mission (now known as the Overseas Missionary Fellowship International) and served there 51 years. See Howard Taylor. Hudson Taylor's Spiritual Secret (Chicago: Moody Publishers, 2009).


multiplying, 70-75% have plateaued or are declining and 10-15% are at or near dying.\textsuperscript{60} Regrettably, many churches now, “find themselves in a place of stagnation or decline. They reminisce of a time past when the nursery was full, the congregation was passionate, the lost were reached, and they were a major means of mission for their city.”\textsuperscript{61}

Simply because a congregation is conducting services and activities, is not evidence that it is fulfilling its divine calling. Data indicates that too many churches are no longer making a spiritual impact on lives. Unfortunately, “it is possible to go to some churches for many years, gain a fine understanding of theology and church politics, but be no closer to the God Jesus Christ than you were at the start.”\textsuperscript{62} Thom Rainer notes in his book, \textit{Autopsy of a Decayed Church}, “…these dying churches focused on their own needs instead of others. They looked inwardly instead of outwardly. Their highest priorities were the way they’ve always done it, and that which made them the most comfortable.”\textsuperscript{63} It is these churches’ failure to pursue a compelling biblical mission that has contributed to the demise of fruitful church ministry.

The reality is that far too many churches have ceased to be engaged in the purpose designed for the New Testament church. The Lord Jesus specifically defined the mission of the Great Commission in Matthew 28:18-20. Based upon Jesus’ divine authority, the church was to go and make disciples of all nations. These disciples were to be baptized and instructed to observe the commands of Christ. Inherent in this mandate is active evangelism and authentic


\textsuperscript{61} Rogers, \textit{Mergers}, 8.


\textsuperscript{63} Thom S. Rainer, \textit{Autopsy of a Deceased Church: 12 Ways to Keep Yours Alive} (Nashville, TN: B&H Publishing Group, 2014), 203-204, Kindle.
spiritual growth. Sadly, these are the very characteristics that are absent from declining congregations today.

Renewal Trends

The present climate for the church can appear dark and desperate. The state of the contemporary church may look much like what the prophet Ezekiel saw when he viewed his nation’s tragic condition. The nation appeared as lifeless as a grave of bones. In despair, he calls out to God and asks, “can these bones live?” (Ez 37:3). The Lord assures the prophet that, “surely I will cause breath to enter into you, and you shall live” (Ez 37:5). God gives hope even when things seem to be hopeless.

Today churches are finding options to address decline and experience revitalization. Churches are discovering hope for a fruitful ministry despite the obstacles of the present reality. Ed Stetzer in response to a report published by the Pew Research Study says, “actually, no serious researcher believes Christianity in America is dying. Not one. Instead, I believe this current cultural shift is bringing clarity that will assist in defining who we are as Christians, and that is a good thing in some ways.”

Yes, some churches regrettably die, however, others have found new ways for God to breathe life into struggling and stagnate congregations.

Church planting, satellite sites, fervent prayer, and a missional focus have all attributed to the renewal movement within churches. Thom Rainer is very optimistic about the state of the church in North America. He attributes several factors to his enthusiasm:

• The influx of church planters has been a good thing for the state of the church in North America.

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• Church splits are no longer the most common way new churches start, and that’s a good thing.
• Church planters are starting more churches with evangelistic DNA than ever before.
• New churches have the opportunity to have a more intentional evangelistic DNA than established churches.65

There are a variety of efforts being pursued by congregations who desire to advance the kingdom and remain vibrant. While this activity is indeed encouraging, for the purposes of this paper, one specific avenue will be explored, that of a church merger.

Church Mergers

To the average person, a merger is connected to the business world, not the church world. When the term is used, it is frequently connected to business entrepreneurs like Donald Trump, Ted Turner, and Richard Branson rather than ministers and members of local churches.66 The thought of negotiations, deals, takeovers and corporate legalities perhaps seems very secular and in no way, have a spiritual application.

What is meant by a church merger? Is a church merger different from a corporate merger? How could such an action be biblical and beneficial to the renewal of churches? To answer these questions as we explore church renewal options, once again, consider what is meant by the word “merger.” As discussed in chapter one, a merger is in its most basic form, the concept of joining two separate entities together as one unified unit.

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66 Men such as Donald Trump (real estate, hotels, casinos, golf courses) Ted Turner (television networks, radio stations, sport teams) and Richard Branson (recording industry, airlines, communications) are well known for their business dealings and negotiations. An online search of these men will provide much information on their businesses and business dealings.
The dictionary defines the word “merger” in broad terms as “to become combined into one.”\(^{67}\) The expression when applied to churches means, “one church (the lead church) absorbs another (the joining church)… the churches become one to achieve a common purpose.”\(^{68}\) Another definition states, “a merger…for ecclesiastical purposes… [is] a congregation giving up its separate identity and uniting with an already existing congregation.”\(^{69}\) Therefore a church merger involves combining two individual congregations into one body for the purpose of better pursuing God’s mission.

In a secular setting, the motivation, methods and outcome of a merger can be far removed from that of a church situation. One might imagine that some business mergers might employ the use of manipulation, deception and other unscrupulous practices. The church, however, has been called to a different standard. The Bible proclaims that believers, “have renounced the hidden things of shame, not walking in craftiness nor handling the word of God deceitfully, but by manifestation of the truth commending ourselves to every man's conscience in the sight of God” (2 Cor 4:2). Church mergers are more than just acquiring assets or increasing its market share. There is a definite spiritual component that should not be overlooked.

“Merging is congruent with the heart of God, the principles of Scripture, and the idea of more effectively using the resources God has provided.”\(^{70}\) Church mergers provide an

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67 Merger is defined as to cause to combine, unit, or coalesce; to become combined into one. Merriam-Webster, Inc. Merriam-Webster's Collegiate Dictionary. 11th ed. (Springfield, MA: Merriam-Webster, 2012). Merger is also defined as the combining of two or more companies or organizations into one. “Cambridge Free English Dictionary and Thesaurus.” Cambridge Free English Dictionary and Thesaurus. Accessed April 11, 2016. doi:http://dictionary.cambridge.org/us/dictionary/english/merger.


70 Tomberlin and Bird, Better Together, 9.
opportunity to display to the world spiritual unity. The Scripture proclaims, “Behold, how good and how pleasant it is for brethren to dwell together in unity! (Ps 133:1).” God delights in joining together His people to advance His kingdom. People from all nations were “merged” into one church (Rom 11:17; Eph 2:15-16, Col 3:11). This unification can be seen in the early church working interdependently, rather than independently (Acts 11,15; 1 Cor 16).

Today, many church leaders are seeing mergers as a God-sent opportunity to overcome the prevailing decline and stagnation that is impacting the church. “There is a growing trend of church mergers happening across the country. Nearly forty percent of the multisite churches in America today derive at least one of their campuses through a merger with another church.”71 Mergers are no longer a rare occurrence as “many are experimenting with the concept and some have found a healthy and life giving way to merge with other churches.”72 Research shows that, “2 percent of US Protestant churches merge annually—that’s six thousand congregations.”73 Church leaders are now seeing the prospect of rescuing “struggling churches through mission-driven mergers.”74 Mergers are trending as a movement that is helping to revitalize the contemporary church.

It should be noted that has potentially beneficial as mergers can be, they are merely a “tool” or an “approach” that could help position the church for the mission. The focus of the church must always be upon the mission. Jesus made this mandate clear when He stated, “Go


73 Tomberlin and Bird, Better Together, 3.

therefore and make disciples of all the nations, baptizing them in the name of the Father and of the Son and of the Holy Spirit, teaching them to observe all things that I have commanded you; and lo, I am with you always, even to the end of the age.” Amen” (Matt 28:19-20). The divine commission to the church was about making disciples. Although a church may do many commendable things, it must remember that it has been sent by Christ to “go into all the world and preach the gospel to every creature” (Mark 16:15).

If the merger does not result in the combined congregations pursuing the lost, the merger was pointless. Essentially, a successful merger will result in two established churches becoming one new congregation that is focused on the mission. The purpose of the merger should be to combine so that the blended congregation can better pursue the Great Commission. The merger birth can produce a renewed zeal and anticipation that can be powerful:

The synergistic momentum that comes from such a merger may provide the critical mass necessary to thrust the church immediately into a new season of growth…In fact, church mergers may be a tool for the revitalization of established churches at a rate that far exceeds the rate of transformation from one pastor attempting to lead a revitalization project alone.

When churches make the focus of their ministry the mission, the Spirit of God empowers them. Jesus promised the church, “…you shall receive power when the Holy Spirit has come upon you; and you shall be witnesses to Me in Jerusalem, and in all Judea and Samaria, and to the end of the earth” (Acts 1:8). This power has the potential to have an even greater impact upon the community when two congregations combine their resources and efforts. Solomon was correct, “Two are better than one” (Eccl 4:9).

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Chapter 3

The Merger Options

The type of merger can vary depending upon the specific factors of the situation. The spiritual conditions of the merging congregation, their numeric size, financial stability, site location, community demographics, and purpose for the merger will each help determine what option to follow. Each option brings both advantages and disadvantages. In every case, the merging churches will undergo changes to its current ministry structure. Therefore, it is essential that the merging churches understand the various elements of whatever option they pursue.

There are several ways to categorize and label merger models. Although every merger has unique aspects, for this thesis, four broad classifications will be used. The merger types will be identified as: (1) The Blended Merger Option, (2) The Acquisition Merger Option, (3) The Multi-Site Merger Option and (4) The Franchise Merger Option.

The Blended Merger Option

A blended merger, as the title implies, is when two churches blend or integrate their individual congregations into a single group. The organization combines its membership, leadership, and assets to form one unified church. One of the churches (almost always the larger of the congregations) will become the “lead-church” and the other (almost always the smaller of the congregations) becomes the “joining-church.” Membership size, financial stability, and effective leadership will dictate that the lead-church will have a greater influence both throughout the process and post-merger ministry. Even though complete equality may be
desired, realistically such is not possible. As one pastor observed, “the merging of churches is a
delicate dance in which one leads and the other follows.”

The combination of two congregations that are blended can produce a very desirable
outcome. David proclaimed in the Psalms, “Behold, how good and how pleasant it is for
brethren to dwell together in unity” (Ps 133:1). Blended mergers can display the type of oneness
that Jesus said should be demonstrated by the church. He prayed, “That they all may be one, as
You, Father, are in Me, and I in You; that they also may be one in Us, that the world may believe
that You sent Me.” (John 17:21) The shared vision, assets, and leadership can help the merged
curch to have an impact beyond what it could have prior to the merger.

Blended mergers, however, require careful consideration. Clarity, compatibility, vision,
and reality are necessary components to a successful result. A blended merger is much like a
marriage; the two separate congregations will become one. No longer will the joining church
have its previous identity.

Marriage is usually between two healthy churches in order to become one stronger
church. These churches are normally in the same general vicinity. This allows the
‘married church’ to have a stronger presence in the city, more effective outreach, and a
better utilization of the resources that God has entrusted. For this to work, the leadership
of both churches needs to be in theological and philosophical agreement. Compromises
would need to be made on both sides in order to make a healthy transition.

As with couples, the church merger “marriage” is different from dating. The completion
of the merger changes the dynamics of both churches physically, spiritually, and legally. A
resulting church “divorce” or an “unhappy marriage,” could bring devastating consequences. The

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76 “Confessions of a Church Merger Pastor | Future of the Church.” August 20, 2014. Accessed April 24,

77 Bill Ingram, “What We Learned from a Failed Church Merger.” CT Pastors. February 2014. Accessed
February 18, 2017. http://www.christianitytoday.com/pastors/2014/february-online-only/what-we-learned-from-
failed-church-merger.html.
reality is that blended mergers do not always produce a positive product. Raymond writes, “There is a common saying that the result of a church merger is ‘1 + 1 = 1’. The reality is more complex. Some merged churches end up closing, or 1 + 1 = 0. Many find themselves in slow decline, just like many unmerged churches. Others thrive and end up greater than the sum of their initial parts.”78

The Acquisition Merger Option

An acquisition merger is when a larger and growing church obtains the assets of a smaller church who has determined its ministry can no longer continue. Attorney Thomas Rose describes a church acquisition merger as when a larger church is “pursuing a mutually beneficial ‘take-over’ of the smaller struggling congregation.”79 This means the smaller church has very few members, failed leadership, and is ineffective in reaching its community.

The dying church usually lacks a compelling vision. The Bible states, “Where there is no vision, the people perish: but he that keepeth the law, happy is he” (Prov 29:18). Although the completed revelation of God is found in the Bible, that revelation and its mandate are sometimes not the priority of churches. Whenever a church loses sight of the vision-mission, people spiritually perish. George Barna says, “Vision for ministry is a reflection of what God wants to accomplish through you to build His Kingdom.”80 The church is to pursue the advancement of God’s kingdom not their own kingdom. Jesus taught the disciples to pray to the Father, “Your


kingdom come. Your will be done on earth as it is in heaven” (Matt 6:10). People and churches perish when God’s vision-mission is not pursued.

The acquisition plan is when the larger church takes possession of the property, funds, and resources of the smaller church. The acquisition may result in the members of the smaller church leaving or else becoming a part of the larger church. There is no sharing of leadership or a concerted effort to blend members. The acquired church donates its assets to the other church. Once this transaction is completed, “the dissolution and termination of the existence of the smaller struggling church’s nonprofit corporation”81 is implemented. The acquisition is merely an opportunity for the failing church to live on through their donation to the ministry of the thriving church.

The Multi-Site Merger Option

The multi-site merger is when churches combine for expanding outreach where one of them does not have a community presence. This model allows the lead-church to “plant” itself in another geographical location while maintaining its present ministry. The joining-church already has members and a facility (either owned or rented) in which they are conducting ministry. The lead-church reorganizes, renames, and relaunches the joining-church as one of its campuses. Although the site-church is not a new church plant, its new association with the lead-church gives it some of the characteristics of a new church plant. The new site-church benefits through the sharing of resources, name association, additional members, and proven leadership of the lead-church. The objective in this merger is to facilitate a greater and more effective outreach.

Research shows that “most multi-site campuses are fully-functioning congregations with a local site pastor. Some churches video-cast their sermons (live or recorded); others have in-person teaching onsite. Some churches maintain a similar worship style at all their campuses and others invite variation.”\textsuperscript{82} This type of merger has greatly increased in popularity. “Today nearly 10 percent of all Protestant church-goers attend a church with multiple campuses. If multisite churches were a denomination, they would be the fourth largest denomination in America.”\textsuperscript{83} Research demonstrates that the growth of multi-sites is an appealing option for larger churches.

- Well over 1,500 churches are already multi-site.
- One out of four megachurches is holding services at multiple locations.
- One out of three churches say it is thinking about developing a new service in a new location.
- Seven out of the country’s ten fastest-growing churches offer worship in multiple locations, as do nine of the ten largest churches.\textsuperscript{84}

The Franchise Merger Option

The franchise merger is technically a type of a multi-site model. In the business world, “a franchise is a business system in which private entrepreneurs purchase the rights to open and run a location of a larger company.”\textsuperscript{85} The franchised business is privately owned and operated but it is affiliated with a parent company that has notoriety, organization, and a successful track record. Some churches chose to merge in a way that resembles a franchise.


\textsuperscript{84} Geoff Surratt, Greg Ligon, and Warren Bird, \textit{The Multi-Site Church Revolution} (Grand Rapids, MI: Zondervan, 2006), 9.

In a franchise merger, an existing congregation merges with a successful established church and becomes part of its network of churches and yet retains a measure of autonomy. The joining-church must transition into the church model of the lead-church. The process of the franchise usually involves the joining-church entering into a legal agreement that grants permission to associate itself with the franchise (lead-church). There are various requirements for this association such as alignment with doctrine, philosophy of ministry, and operational structure. This connection means the joining-church will gain use of the franchise name, logos, teaching, training and organizational materials. The advantage of such a merger is that it gives the joining-church name recognition, resources, and a proven model for ministry.

A few examples of franchises can be seen in the ministries of Life Church (Pastor Craig Groeschel) in Edmond, Oklahoma; North Point Community Church (Pastor Andy Stanley) in Alpharetta, Georgia; and Harvest Bible Chapel (Pastor James MacDonald) in Chicago, Illinois.\(^86\) Each of these ministries has developed a network of churches. The process for a church to merge with the network varies depending upon the ministry and the level of connection.

For example, in the Life Church Network, churches can connect on three levels: (1) Network Plant (a group of people meeting together with the intent to become a Network Church), (2) Network Church (a church meeting weekly that receives primary teaching content from LifeChurch.tv) and (3) Network Partner (a church or ministry receiving LifeChurch.tv teaching content as the primary teaching for an additional venue on a weekly basis).\(^87\) North Point Community Church states that its “North Point Partners are autonomous churches that have

\(^{86}\) Information on church “franchises” can be found at these church sites: Life Church (https://open.life.church), North Point Community Church (http://northpointpartners.org) and Harvest Bible Church (http://harvestbiblefellowship.org).

an official relationship with North Point Ministries. They are aligned with the same vision, mission, and strategy as our Atlanta-area churches."  

The potential partner churches enter into a 3 to 6-month process, which leads to a decision to become a part of the network. Once accepted there is a $1,000 per month fee, plus costs for materials and training. Harvest Bible Chapel has one of the most extensive processes of becoming part of their network. Harvest churches must adopt a specific doctrinal statement as well as a set of by-laws. A required 5% of the annual network church’s budget must be paid to the main Harvest Bible Chapel.

The Option Decision

Both the lead and joining congregations should carefully consider which merger model is best for them. The decision regarding which option to pursue has enormous consequences. Author and minister, Dennis Bickers empathizes that, “a church should be as concerned with the process of reaching a decision as it is regarding the decision itself.” The process should begin with an honest appraisal of (1) the health of their churches and (2) their motivation for the merger.

The Health of the Church

Each church will bring into the merger its strengths and weaknesses. Left unaddressed, these factors, both good and bad, will become part of the makeup of the merged church. Problems do not disappear just become the merger has been implemented. Without a truthful evaluation of both ministries, there is great potential for conflict to occur.


90 Bickers, The Healthy Small Church, 66.
The Apostle Paul wrote, “For I say, through the grace given to me, to everyone who is among you, not to think of himself more highly than he ought to think, but to think soberly, as God has dealt to each one a measure of faith” (Rom 12:3). Opinions are not always objective. There is a natural tendency to view oneself in a more favorable fashion. It’s easy to observe the weaknesses in other churches and much more difficult see our own church’s issues.

Psychologist Phil McGraw says, “You cannot change what you do not acknowledge.” Ignoring problems only prolongs their impact. A realistic examination of the true health of the church is essential to making the best decisions regarding the merger. Dennis Bickers put it this way, “You may not like the results you get when you give your church a health checkup, but if you can find problems before they have done any permanent damage, you’ll have the opportunity to make the needed changes to return your church to health.”

The Motivation of the Church

The Bible encourages believers to do good. Galatians 6:10 states, “Therefore, as we have opportunity, let us do good to all, especially to those who are of the household of faith.” However, God is not only concerned that the believer’s actions be right, He also wants their motivation to be right. Jesus taught, “Take heed that you do not do your charitable deeds before men, to be seen by them. Otherwise you have no reward from your Father in heaven” (Matt 6:1). Giving to the poor is a noble deed, however, doing so with the motive of soliciting praise from others, forfeits God’s blessings.

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92 Bickers, The Healthy Small Church, 137.
As the churches decide on a merger model, there are some probing questions that should be asked and answered to determine the motivation.

- Why is the merger being pursued?
- How is the kingdom of Christ advanced by this merger?
- Who will get the praise for this merger?
- Will this merger impact the lost in the community? If so, how?
- What does the membership think is the reason for the merger?

Honestly answering these diagnostic questions can be a challenge. The truth discovered may reveal that the initial assumptions were incorrect. There may also be a difference in the perception held by the leadership and the membership. Unless these questions are asked and answered, the merging churches will not have assurance that their motivation is proper. And unless the motivation is correct, the blessing of God will not be upon their efforts.

A period of serious introspection is in order. The decision to merge should be a matter of considerable prayer. The leadership and membership should echo the sentiments of the psalmist who cried out, “Search me, O God, and know my heart; Try me, and know my anxieties; and see if there is any wicked way in me, and lead me in the way everlasting” (Ps 139:23-24). Only after it is determined that the incentive for the merger is right, will the churches have the confidence that God is guiding the process. As King David observed, “The steps of a good man are ordered by the Lord, and He delights in his way” (Ps 37:23). To attempt the merger without the direction of the Lord would be a foolish and unfruitful endeavor.
Chapter 4
The Church Merger Survey

There are a lot of questions that leaders should ask when exploring a merger. John Maxwell says, “Asking the right question of the right person at the right time is a powerful combination because the answers you receive set you up for success”

Often leaders discover that knowing what questions to ask can be as helpful as knowing the answers.

Research was conducted to consider if church leaders asked and answered the right questions when attempting a merger? Were there elements that defined successful mergers? What processes were followed by churches that facilitated positive results?

Research Participants

This author initiated a research survey involving a group of Baptist churches in the greater Jacksonville, Florida area. Of the fifteen churches selected, ten responded to the survey. Each of the churches in the survey were identified as having attempted a merger. The churches that took part in this research included Southern Baptist and Independent Baptist churches. The participants in the survey remained anonymous and were not identified in the research other than their Baptist denominational affiliation and general geographical area.

Research Methodology

The survey was sent to each selected church to determine the commonality of methods, purpose and procedures used in the merger attempt. The theory is the mergers that were successful and those that were not successful, followed a similar procedure. This survey

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included fifteen specific questions regarding the church’s experience in attempting a merger.\textsuperscript{94} Space was provided for the participant to provide additional information regarding their response. The surveys were returned in a provided postage-paid return envelope without any identifying information from the participant.

Research Results

How did churches begin the conversation regarding merging? Who started the process to consider a merger? The research showed that half of the initial contacts with the other church were prompted by the lead-church (see Figure 1). The other half of the contacts were initiated by various individuals ranging from other church and denominational leaders to the pastor of the other church (see Table 1).

\begin{figure}[h]
    \centering
    \includegraphics[width=0.5\textwidth]{figure1.png}
    \caption{Survey Question 1.1}
\end{figure}

\textsuperscript{94} See Appendix A for the full survey.
| If someone else, what was their position? |
|-----------------|-----------------|
| Church Trustee  | Church Board    |
| Associational Leader | Senior Pastor  |
| Deacon          |                 |

The overwhelming number of initial contacts were made by a personal conversation from the lead pastor with a leader of the potential merging church. Only a small percentage of these first contacts were made through a letter or email and none were made by a secondary individual or by other means (see Figure 2).

![The initial contact was made by?](image)

What were the numeric sizes of the merging congregations? The research indicated that the size of the church that initiated the merger was almost always significantly larger than the other church (more than 80% of the time). In only ten percent of mergers did a smaller church initiate the merger process. It should be observed that most churches that were approached for a merger had a congregation that was less than fifty members (see Table 2).
What affiliation were the survey churches? All the churches included in the survey were Baptist in denomination. One hundred percent of these participants choose mergers with other churches that were of the same Baptist affiliation as their own congregation (see Table 3).

<table>
<thead>
<tr>
<th>Table 2: Survey Question # 2</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>At the time of the merger, what was the congregational size of the churches?</strong></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>--------------------------------</td>
</tr>
<tr>
<td>Less than 50</td>
</tr>
<tr>
<td>50 – 75</td>
</tr>
<tr>
<td>76 – 100</td>
</tr>
<tr>
<td>101 – 200</td>
</tr>
<tr>
<td>More than 200</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Table 3: Survey Question # 3</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Was the other church of the same Baptist affiliation as your congregation?</strong></td>
</tr>
<tr>
<td>Yes</td>
</tr>
<tr>
<td>No</td>
</tr>
</tbody>
</table>

There can be many reasons that a church considers a merger. The participants in this survey were asked to identify what specific reasons prompted them to pursue a merger. The majority indicated that the merger would help facilitate their church mission. Half of the participants noted that preservation and economics were major issues driving the merger. Forty percent said that the location was a significant factor in the decision to merge (see Figure 3).

Half the churches in the survey blended their congregations into one ministry. Forty percent used the merger to create a multi-site location. Ten percent simply took over a failing smaller church. None of the churches surveyed sought a franchise merger (see Table 4).
Table 4: Survey Question # 4.2

<table>
<thead>
<tr>
<th>What type of merger was pursued?</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Blended</td>
<td>50%</td>
</tr>
<tr>
<td>Acquisition</td>
<td>10%</td>
</tr>
<tr>
<td>Multi-Site</td>
<td>40%</td>
</tr>
<tr>
<td>Franchise (Part of a Network of Churches)</td>
<td>0%</td>
</tr>
</tbody>
</table>

How long did it take to complete the merger? Surprisingly, most churches accomplished their merger process in less than six months. Twenty percent of the churches worked through the merger in a six month to one year period and only ten percent of the churches took longer than one year (see Figure 4).
What did churches use to guide them through the merger process? The survey reveals that most lead pastors did not read any materials on church mergers (see Figure 5). The research also showed that most of the pastors had no prior experience with a merger (See Figure 6). However, eighty percent of them did consult with someone who did have knowledge and experience in church mergers (See Figures 7 and 8). Only 20% of lead pastors moved through the process without reading anything on mergers, with no prior experience with mergers and without seeking an adviser for the merger (see Figure 7).
Prior to this merger, have you had any experience with church mergers?

- Yes, 10%
- No, 90%

Figure 6 Survey Question 7

Did you seek out advice from a consultant or experienced pastor as you went through the merger process?

- Yes, 80%
- No, 20%

Figure 7 Survey Question 8.1
Did the merger of the two churches create a new congregation? In most of the mergers, the outcome resulted in the other church becoming a part of the lead-church’s ministry (see Figure 9). In only ten percent of the mergers did the process result in the creation of a new combined congregation (see Figure 10).

Figure 8 Survey Question 8.2

Figure 9 Survey Question 9.1
Figure 10 Survey Question 9.2

How did churches handle combining the leadership of the churches? In half of the mergers, the joining-church had a senior pastor on staff (see Figure 11). In forty percent of the mergers, this senior pastor either became the lead pastor of the merged church or he left the church for another ministry. Only in twenty percent of the mergers did the senior pastor remain on staff in a subordinate position (see Figure 12).

Figure 11 Survey Question 10.1
Since churches are considered religious, non-profit corporations by most states, there are always some legal issues that must be addressed throughout the merger. The combining of funds, property, personnel, and corporations requires an understanding of laws and regulations as they apply to churches. Most churches in the survey consulted with an attorney and used his services during the merger process (see Figures 13 and 14).
What elements did churches feel were essential to retain in the merger? Participants in the survey were asked what items could not be compromised. An overwhelming ninety percent indicated that matters of doctrine were non-negotiable. Sixty percent felt that the leadership structure was an essential. Forty percent felt that the name of the church was significant. The lowest concern for this question was that of music style (see Figure 15).
What was the outcome when churches put the merger to a vote? When it came to approving the merger agreement, there was enormous support and unity within the congregation of the lead-church. Ninety percent of the lead-churches carried a vote of one hundred percent. The percentages were not as favorable within the joining-church. Although still a moderate amount, sixty percent of the joining-churches carried a vote of ninety to ninety-nine percent. Ten percent of the other churches failed to rally enough votes for the merger to pass (see Table 5).

Table 5: Survey Question # 13

<table>
<thead>
<tr>
<th>What was the percentage of “in favor” votes?</th>
<th>Your Church</th>
<th>The Other Church</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>90%</td>
<td>20%</td>
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<tr>
<td>99% - 90%</td>
<td>0%</td>
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<td>&lt; 50%</td>
<td>0%</td>
<td>10%</td>
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Even though in most cases there was strong support to approve the merger, fifty-six percent of churches noted that some members ultimately left because of the merger (see Figure 16). However, the majority did not feel that the number of those who left represented a significant number of members lost (see Figure 17).

Figure 16 Survey Question 14.1

Did any members leave the church as a result of the merger?

Yes, 56%
No, 44%

Figure 17 Survey Question 14.2

Do you consider the number that left to be a significant amount?

No, 83%
Yes, 17%
The final question of the survey asked the participants if they thought that their merger was a success. Seventy percent said “Yes,” twenty percent said “No,” and ten percent said they were “Not Sure” (see Figure 18). Most of the participants then qualified their answer with a written comment (see Table 6).

![Figure 18 Survey 15](image)

**Do you consider the merger to be successful?**

<table>
<thead>
<tr>
<th></th>
<th>0%</th>
<th>10%</th>
<th>20%</th>
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<td><strong>Yes</strong></td>
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Table 6: Survey Question # 15.2

<table>
<thead>
<tr>
<th><strong>Why do you consider the merger to be successful?</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Our church would have been in foreclosure proceedings if not for the merger. We consider the merger a win-win!</td>
</tr>
<tr>
<td>Was of God. The merger was slow, deliberate and transparent.</td>
</tr>
<tr>
<td>The spirit and health were totally different. We moved to a better location.</td>
</tr>
<tr>
<td>After the initial stress of change, things have settled out and we are growing.</td>
</tr>
<tr>
<td>The merger process went well. But as we sought to combine and unite two congregations, complaining began and that caused people to leave. The church we merged with wanted us to build a building too soon. Because we didn't build, some people complained and left. This caused a big wave of people leaving. We by God’s grace recovered. But it was very hard.</td>
</tr>
<tr>
<td>It was the ‘changing of the guard’ as an older church was given new life and leadership was handed over to a young staff.</td>
</tr>
<tr>
<td>The merged congregation is healthy. Attendance has risen from 20 to 150+. Souls have been saved. Baptisms happen regularly. The gospel is going forth from them. The original church members are thrilled and remain engaged.</td>
</tr>
</tbody>
</table>
Research Observations

The overall value of this research may be limited because of the number of survey participants, the specific geographical location and the denomination of the churches. However, general insights can be learned from how these churches approached mergers. The following are several observations taken from the survey data.

Personal Contact is Valuable

Letters and emails are a popular and efficient means of communication. They give the sender an opportunity to carefully choose his words and provide a written record of the contact. However, letters and email can be perceived as impersonal and fail to adequately convey the desired emotions. “The biggest drawback and danger with email is that the tone and context are easy to misread. In a live conversation, how one says something, with modulations and intonations, is as important as what they are saying. With email it is hard to get the feelings behind the words.”95

In eighty percent of the churches, a personal contact was made to start the merger conversation (see Figure 1). Only twenty percent of churches used a letter or email to engage the topic. A face-to-face conversation allows for immediate feedback as well as the chance to pick up on nonverbal clues. “The belief is that 55% of communication is body language, 38% is the tone of voice, and 7% is the actual words spoken.”96 A personal dialogue provides the

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opportunity to express passion and sincerity in a way written communication cannot fully accomplish.

Small Churches Often Struggle

The small church faces a variety of issues that can directly contribute to its lack of growth. While some of these conditions may be unavoidable, many are a result of the culture that has been created within the congregation. Here are a few struggles small churches face:

- Many suffer from serious self-esteem issues.
- Most of them lack common vision except for survival.
- Some are very exclusive due to strong family ties that exist with the church.
- Resources are usually limited.
- Too much is frequently expected of the pastor.
- Leadership is in the hands of a few people who may or may not be spiritually qualified to exercise such leadership.97

In the survey, eighty percent of the joining-churches had a congregation that was under fifty members (see Table 2). This number is below the national average church size of 75 members.98 Many of these same churches indicated that one of the primary reasons for pursuing a merger was economics and preservation (See Figure 3). Also, seventy percent of survey churches accomplished the merger process in less than six months (See Figure 4). The swiftness of the mergers may well indicate the urgent condition of the small churches. These survival factors suggest that a significant and immediate change was needed within the structure of these small churches.

Seventy percent of respondents said that mission was one of the main reasons for the merger (see Figure 3). Of all the reasons listed, this cause had the highest percentage. This

97 Bickers, The Healthy Small Church, 9.

possibly indicates that although small churches may know and accept the Great Commission, they nevertheless have difficulty making it the priority. Former President of the Southern Baptist Convention, Ronnie Floyd said, “There is only one thing, and I mean only one thing, that keeps a church unified and that is the priority of the Great Commission.”\footnote{Ronnie Floyd. “Unity in The Southern Baptist Convention: What Threatens It and What Brings It.” RonnieFloyd.com. July 27, 2015. Accessed March 17, 2017. http://www.ronniefloyd.com/blog/9534/southern-baptist-convention/unity-in-the-southern-baptist-convention-what-threatens-it-and-what-brings-it/} The merger into a community that was focused on the mission helped to revitalize the smaller churches.

Churches Need to Survive and Thrive

Survey participants indicated several specific reasons why they were pursuing a merger and what type of merger they intended to pursue. Among the top responses of reasons was economics (50%) and preservation (50%). This data suggests that survival may have been a significant factor in moving churches toward the blended merger option. In the survey, fifty percent of the churches opted for a blended merger (see Table 4). Such stressful issues related to survival could have moved the congregations toward the perceived security of a stable and growing church ministry. The comments made by survey participants illustrate this was the concern of some churches (see Table 6).

Eighty percent said that the merger did not create a new congregation (see Figure 9). The majority blended their congregations into an existing and larger community. This change, although difficult, placed the smaller churches in healthier environments. One of the comments noted that, “After the initial stress of change, things have settled out and we are growing” (see Table 6). By removing the financial burden from the smaller church, its members were free to refocus on the mission instead of on survival.
Location (40%) and multi-site (30%) were also cited as major factors in the merger process (see Figure 3). These two dynamics seem to be related and reflect the ever-growing interest in creating satellite campuses. Thom Rainer notes that:

More struggling churches see merging with a multisite church as their best option for health or even survival. The leaders of the multisite churches noted an increased frequency in contact by leaders of struggling churches. One third of all the sites started in the study were the results of mergers. Stated simply, many struggling churches are seeking to be acquired by multisite churches. This new reality has both practical and ecclesiological implications for the future.¹⁰⁰

According to research conducted by the Leadership Network,

One in three multisite campuses is created as the result of a church merger. A recent Leadership Network survey of churches who had participated in a merger revealed that multisite churches rated their experiences higher than churches that consolidated into one location. This trend held across church sizes and distance apart. Multisite churches also reported greater growth after a merger.¹⁰¹

Interestingly, none of the survey churches sought out a “franchise” merger (see Table 4). Although many churches have had success with “franchising” their ministry, it is difficult to determine, based on this research if such an approach will increase in popularity.¹⁰²

Listen to Wise Counsel

Clearly, most churches had little knowledge about mergers. Ninety percent of the leaders had no prior experience with mergers (see Figure 6). The research also revealed that most leaders


¹⁰² Currently, Life Church has 24 churches (http://dev.networkchurches.tv/church/), North Point Church has 72 churches (http://northpointpartners.org/directory) and Harvest Bible Chapel has 205 churches (http://harvestbiblefellowship.org/churches/) in their franchise networks.
did not read any materials on the topic of mergers (see Figure 5). This statistic may be attributed to the fact that there has been very little written on this topic. The data showed that only twenty-two percent of the leaders did read materials on mergers. Responses concerning the material that was read noted that only two different books were used.¹⁰³

The Scriptures warn that “where there is no counsel, the people fall; but in the multitude of counselors there is safety” (Prov 11:14). The majority (80%) did seek out merger counsel (see figure 7). This guidance came from either someone who was a professional church consultant or from a pastor who had experience working through a merger. Using a consultant is an option many churches are utilizing today. According to an article in the Washington Post, “churches are hiring some of the estimated 3,000 consultants trained in ecclesial concerns, according to the Society for Church Consulting, a membership organization in Louisville, Ky.”¹⁰⁴ When considering the consultants that were selected, eighty-seven percent choose someone who had actual experience working through mergers (see Figure 8).

In additional to pursuing counsel for the merger procedure, most churches also sought out legal advice (see Figure 13). The research revealed that of the seventy percent who obtained legal advice, eighty-six percent used the services of an attorney to complete the merger (see Figure 14).

¹⁰³ Survey Question 6.2 asked what merger materials were read. Of all the responses, there were only two different books listed: Jim Tomberlin and Warren Bird, Better Together: Making Church Mergers Work (San Francisco, CA: Jossey-Bass, 2012) and Dan Southerland. Transitioning: Leading Your Church Through Change (Grand Rapids: Zondervan, 2002).

Some Things Are Essential

Mergers, to some degree, require a lot of give-and-take. Concessions will need to be made in most cases, if two churches are to be blended into one congregation. There should be however, some things that must not be compromised. Such things should be recognized as essential to the mission or identification of that church.

In the survey, churches were asked to indicate what issues they considered to be the “non-negotiables” with the merger. Participants were given a list of nine issues which included doctrine, Bible versions, music style, worship style, church name, missionary support, leadership structure, financial structure and affiliations (see Figure 15). Each marked which of the items they felt were critical within the merger. Respondents could choose any number of the nine choices that were listed.

Doctrine was clearly the most significant issue that was expressed in the survey. Ninety percent of the churches noted that their doctrine mattered the most. It is a church’s doctrine or core beliefs that define and direct the congregation. While unity should be sought in the merger, it must be achieved without the abandonment of the church’s essential values. R.C. Sproul notes, “How one understands the person and work of Christ is critical to unity of faith and the unity of the gospel. If we differ among ourselves at the essential points regarding these matters, we have nor achieved the unity of faith which the Scriptures speak.”¹⁰⁵ A false unity is no unity. To compromise on a fundamental is to ignore the admonition of Jude who said we should, “contend earnestly for the faith which was once for all delivered to the saints” (Jude 1:3).

Leadership Matters

John Maxwell has long said, “Everything rises and falls on leadership.” The leadership that influences the merger process, really does matter. The survey backs up this statement as sixty percent of the churches considered the “leadership structure” to be a non-negotiable (see Figure 15). Without the right leadership, the process is destined to fail or to produce an undesirable result.

Should the merger be successful, both the leaders and the organization will be impacted. Tomberlin and Bird have noted that, “An essential issue—and an emotional one at that—for churches to explore as they talk together about a merger is what will happen to the pastor, any staff the existing board, and the primary committees of the joining church.” At the start of the merger efforts, half of the joining churches currently had senior pastors (see Figure 11). This meant that although the joining senior pastors were supportive of the merger, they were also aware that their personal leadership role would need to be determined.

Most of these pastors will transition into a secondary leadership position or else resign and leave the church. It was noted that in forty percent of the churches, the joining senior pastor left the church (see Figure 12). In only twenty percent of churches did he remain with the church in another staff position. These leaders viewed the goal of merging the two churches, to be more important than their personal positions.

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Your Name Conveys Your Identity

Shakespeare asked the question, “What's in a name? that which we call a rose by any other name would smell as sweet.”\(^{108}\) While it is true, a name cannot change who you are, it can and does convey what you are. We see an example of this in the life of the Apostle Peter. He was once known as simply as “Simon” (Matt 4:18). Jesus had grander plans for Peter and renamed him, “Now when Jesus looked at him, He said, ‘You are Simon the son of Jonah. You shall be called Cephas’ (which is translated, A Stone)” (John 1:42). Peter would be known as a “stone” or a “rock.”

Churches in the survey felt their name was a significant factor in the merger process. Forty percent said their church name was a non-negotiable (see Figure 15). Most lead churches refused to alter their identity. The importance of name identity is reflected in the fact that ninety percent said the merger did not create a new congregation for both churches (see Figure 9) and the merged church took on the identity of one of the churches. Seven-eight percent of these churches said the merged church took on their church’s name (see Figure 10). The data shows how critical the name was to the congregations. Pastor and author, Gordon MacDonald agrees that the right church name is vital. He recalls a time when the 180-year-old church he pastors was considering a name change. In an interview with Christianity Today, he states, “A name is important. It can say something about who you are or who you want to be.”\(^{109}\)

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\(^{108}\) William Shakespeare, *Romeo and Juliet*. (Place of publication not identified: CreateSpace, 2015), 34.

Support Signals Success

To consummate the merger, both churches must be supportive of the decision. Depending upon the by-laws which dictate the voting requirements, each church must have a certain level of congregational backing if the merger is to be successful. It is not enough for the leadership to be on board with the merger; the congregation must buy into the union. The vote, if the motion is approved, simply puts into action the legal and operational elements that make the two congregations into one entity.

According to the survey data, the majority ratified the merger with an eighty percent to a one hundred percent approval (see Table 5). Such high numbers of support are extremely encouraging when endeavoring to blend both churches into one body. Low approval numbers would indicate that although the motion passed, there may be significant problems that develop later. The survey revealed that despite having strong support when it came to the vote, some members chose to leave. Fifty-six percent of the churches said that they eventually lost members because of the merger (see Figure 16). However, seventy percent said that they did not consider the number of members who left to be significant (see Figure 17).

The participants were asked if they considered the merger effort to be successful. They were also given the opportunity to share comments on why they believed the merger was a success. Seventy percent asserted that they believed that the merger was successful (see Figure 18). This is a testament to the effectiveness of the leaders who guided the process.

Closing Observations

The merger survey results provided much insight into the actual practices used by churches. What the information revealed, was not only what transpired in the merger attempts, but also, what were the some of the motivations, values and methods of the churches. Data
obtained from the survey was helpful in identifying which practices were considered beneficial and which may have hindered the progress.

The survey did however, have limitations in what information that was collected, the number of participates and the location of the survey churches. Additional data that could augment the survey may be found through the local association and state convention offices. These agencies should have extensive information about the health, culture, and leadership of the churches in their area. The local associational director of missions (DOM) is often extremely knowledgeable about the individual congregations in his district. Leaders should not overlook the assistance that a good DOM can provide.

Although none of the churches followed the same approach, there were similarities noted that were indicative of successful mergers. The best practices of these churches were identified and studied. Many of these observations will be transferable into the next section of this thesis as specific steps are given to guide the merger progression. The question will be explored, “Is there a systematic approach that churches should follow when pursuing a merger?” Instead of developing a program, a series of steps will be offered that is designed to take the church step by step through to the completion of the merger.
Chapter 5
The Seven Steps to a Successful Merger

The findings from the research data revealed in chapter 4 that most churches shared common elements in their merger attempt. Unfortunately, the majority had no prior experience with mergers nor were any materials read that guided them through the process. Most leaders did seek out advise from an experienced person. However, there was no indication that any leader followed a standardize approach. It is reasonable to assume that the merger process could be improved if the leaders had a specific sequence of steps that would guide them through the merger. These steps would take into consideration the necessary components of a merger that may not be obvious to inexperienced leader, or for even an experienced leader.

The chapter will provide seven steps that will guide the leaders through the merger process. These steps have been developed in a specific order that will help the leader consider all the aspects involved in the progression of the merger.

Step 1: INSPIRE - A Clear Vision

Church mergers are birthed in the heart of a leader or an individual who has a passion for the church. They begin with someone who considers the possibility that “Two are better than one, because they have a good reward for their labor” (Eccl 4:9). Mergers are a result of a leader who passionately wants to advance God’s kingdom and has been led of the Lord to take this move of faith. Mergers are attempted because a leader imagines a better way to reach beyond where his congregation is today and into where it could be tomorrow.

The leader must first spend some time in prayer and discern God’s direction. God will not lead every pastor to pursue a church merger. Even those whom the Lord may call into a merger
must be certain of His leadership in this matter. God will provide His guidance if it is truly sought. The Scriptures tell us, “If any of you lacks wisdom, let him ask of God, who gives to all liberally and without reproach, and it will be given to him.” (Jas 1:5).

There may be occasions in which the pastor neither possesses the desire nor the experience to lead in a merger. However, as he as sought the Lord’s will in this matter, he is convinced that a merger is what is best for the congregation. The leader then must search out someone else who has the vision and ability to guide the church to accomplish God’s will.

In Exodus 4, God has instructed Moses to speak to Pharaoh to demand the release of the Israelites. Although there can be no doubt that such an action is the will of God and certainly what would be best for the people, Moses reluctant. He has no desire to return to Egypt and is very self-conscious of his speech handicap. But ultimately, Moses complies with God’s command, relaying upon Aaron to do what he assumed he could not do.

What is most important is that the pastor know how God is leading. As the leader determines God’s will in the matter, he should ask these questions:

- Are you certain that God is leading in this action? How?
- Do you sense a strong and undeniable prompting from the Holy Spirit?
- Are there any circumstances that evidence God is at work in this vision? What are they?

After the leader has determined God’s leadership in a merger pursuit, he must clarify the vision. Vision requires a leader to see what is not presently visible and then to act to make it visible. Vision is about a “dream” or “burden” that God has placed upon the leader’s heart. Andy Stanley defines vision as “a clear mental picture of what could be, fueled by the conviction that it should be. Vision is a preferred future. A destination.”

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110 Stanley, Visioneering, 29.
Considering Andy Stanley’s definition of vision, notice the various components that should comprise a vision:

**Vision is Clear**

The leader must be able to describe what God has place upon his heart regarding the merger. He must be able with words to paint a picture of what the merger will look like. Without clarity in the vision it will be difficult for others to understand where they are being led and why they should follow. People follow a leader with clarity.

It is likely that many of the members will not immediately comprehend the purpose of the merger. Clarity of the vision will help them see its value and need. For example, there is a distinction between just loading a truck with cases of water and that of supplying drinking water to people in a crisis. No one gets enthused about picking up a case of water and filling the trailer of a truck. However, providing needed water to people recovering from a hurricane is a different story. Giving water to thirsty people gives meaning and purpose to what could be viewed as an insignificant task. A clear vision connects value to the God-given mission of a merger.

Vision must be effectively communicated to the congregation. Andy Stanley suggests that in order to make vision “stick,” the leader must:

1. State the vision simply.
2. Cast the vision convincingly.
3. Repeat the vision regularly.
4. Celebrate the vision systematically.
5. Embrace the vision personally.  \(^{111}\)

The leader should also utilize a combination of approaches to broadcast the vision to the entire church. These avenues should provide an opportunity for members to hear and respond to the vision. Several formats for communication include:

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• **Preaching:** The pastor should include the vision in his sermons. It could be beneficial for the pastor to make the topic of vision into a series of messages.

• **Bulletin:** The church’s weekly publication should contain statements and quotes from the pastor regarding the vision.

• **Blog:** If the pastor has an online blog, he should write about the vision and share what the vision means for his congregation.

• **Small Groups:** In smaller settings such as Sunday School, Grow Groups and Bible study groups, the topic of the merger vision could be discussed.

• **Leadership:** The pastor ought to personally speak with the church’s leaders such as deacons, elders, teachers, and directors, about the merger vision.

Vision is Future

Vision focuses on what could be accomplished in the future. Church research expert, George Barna, has written on the topic of vision. He says that, “vision concentrates on the future. It focuses on thinking ahead rather than on dwelling upon or seeking to replicate the past…The means to success in ministry is to focus upon God and to be committed fully to His vision for your ministry and to what He will do with you and through you in the future.”

Since vision deals with the future, it comprises the component of faith. Matters of faith, from the leader’s perspective, carry with them risk. Since the realization of the vision is forthcoming, there is the possibility for failure. Yet, the writer of Hebrews boldly states, “Now faith is the substance of things hoped for, the evidence of things not seen” (Heb. 11:1). Although faith deals with that which has yet occurred, since it is connected to God, it is substantive. Faith provides the leader with an opportunity to trust God and see Him work in a way that ordinarily would not be observed.

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Vision is Compelling

The vision for the leader is not only something that he believes should be done, it is something he believes must be done. Should the leader feel otherwise, there is a real possibility of the merger not happening or progressing so slowly that dies it the process. The leader must be firmly committed to seeing the vision accomplished. If the leader has an agenda that is not fully supportive of the merger vision, his actions or lack of action, could directly contribute to the failure of the merger. For example, should a leader have a plan to retire or transition to another church, he may intentionally delay the merger progresses for his personal benefit. Such delays could impede the process to the point that the merger is unattainable. Therefore, the leader must personally embrace the vision of the merger and be devoted to its fulfillment.

Vision is compelling and persuasive. The leader must be able to effectively communicate the vision so that it moves others to support the effort. The vision should inspire members to venture beyond where they are today. The members must be convicted that maintaining the status quo is not an option. John Maxwell teaches that, “People change when they...Hurt enough that they have to, Learn enough that they want to, and Receive enough that they are able to.”

Having a vision that is clear, courageous and captivating is needed to advance the merger attempt.

To bring the vision into clarity, the leader should take time to ask and answer some powerful and penetrating questions about the merger vision. If the leader fails to have clarity on the vision, then those in the congregation will not have a clear comprehension of the vision. The leader should work through his thoughts and motives to better understand what God is leading the church to do. Completing the provided worksheet will help the leader to bring focus to the

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vision (Figure 19). Writing out the answers to the questions on the worksheet will assist the leader in expressing the vision in a concise and clear manner. As documented below in the worksheet, the leader should personally grasp the various elements of the merger vision and be able to convey them to others.

![MERGER VISION WORKSHEET](image)

**Vision Has a Destination**

A merger vision has a specific destination. When Abraham was given a vision for the land of the covenant, God was very specific regarding the location. At first, God simply directed Abraham to move to a place that would later be revealed. Then after Abraham had obeyed, God said to him, “To your descendants I have given this land, from the river of Egypt to the great
river, the River Euphrates—the Kenites, the Kenezzites, the Kadmonites, the Hittites, the Perizzites, the Rephaim, the Amorites, the Canaanites, the Girgashites, and the Jebusites” (Gen 15:18-21). Although Abraham struggled with some of the vision’s components, the destination was clear and definite.

The merger vision destination must not be generic or ambiguous. It should lead the church into a defined merger type. The leader must decide on what kind of a merger will be pursued and determine the available options. He will need to decide if the destination will be a Blended Merger, an Acquisition Merger, a Multi-Site Merger or a Franchise Merger. Since each of these merger types achieves a different result, the leader will need to evaluate which type is best suited to accomplish the vision.

The objective here should not be for the leader to choose that which is the easiest to achieve. It is possible that reaching the destination will be a difficult and demanding process. The circumstances may even present an impossible scenario, however, not impossible with God. Jesus boldly proclaimed, “…With men it is impossible, but not with God; for with God all things are possible” (Mark 10:27). The leader therefore must have a firm commitment to the merger vision. He must carefully take into consideration the vision God has given, the dynamics of his congregation and the actual options that are available.

The components of the vision destination are complicated. It would be a worthy investment time for the leader to put to writing a description of where the merger will lead the church. Below a worksheet has been provided that will help the leader process his situation as he determines God’s direction for the merger. The leader’s answers to the worksheet questions should provide insights that will aid him in leading the merger process.
**MERGER VISION DESTINATION WORKSHEET**

The leader must know where the vision will lead his church. He must also be able to distinctly articulate the destination in terms that can be understood by the congregation. This worksheet will guide the leader in defining the vision’s destination.

1. **What type of merger will you pursue?**
   - [ ] Blended Merger
   - [ ] Acquisition Merger
   - [ ] Multi-Site Merger
   - [ ] Franchise Merger

2. **Write out a brief description of the merger type you selected in the above question. Try to state this in simple terms which would help the congregation understand the merger type.**

3. **How will this type of merger assist in fulfilling the vision?**

4. **Do you see any current opportunities for a merger? Describe what they are and why you believe them to be an option.**

5. **What challenges do you anticipate will be connected to this type of merger?**

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**Figure 20: Merger Vision Destination Worksheet**

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**Step 2: INVESTIGATE - Initiate Contact**

In the book of Joshua, we are told of the vision God gave to Joshua. This vision had previously been given to Moses. However, due to Israel’s unbelief, the nation wandered in the wilderness until a new generation emerged. Joshua now was given the opportunity to inspire the people to enter the Promised Land. God said to Joshua, “Moses My servant is dead. Now therefore, arise, go over this Jordan, you and all this people, to the land which I am giving to them—the children of Israel” (Josh 1:2).

Joshua would lead the people across the Jordan river. Yet, their mission was to not only enter the land but to conquer and take possession of it. While the destination was clear, the
specifics of the destination were anything but clear. Joshua decides to commission a reconnaissance mission. “Now Joshua the son of Nun sent out two men from Acacia Grove to spy secretly, saying, Go, view the land, especially Jericho” (Josh 2:1). The mission of this team was to gather intelligence about the city and people of Jericho. Joshua had hoped that such information would be beneficial as he and his generals formed their strategy.

In a similar way, the leader that has a vision for a merger must also gather good intelligence. Good decisions demand good information. A strategy development with faulty data will likely result in an effort that is less than successful. The more that the leader knows about the intended merger church, the better he will be able to formulate an effective strategy.

Obviously, the pastor must identify another church for the merger. Since not every church is a good candidate, certain data will be essential to the start of such a conversation. So, what factors should a leader identify when seeking a potential church for a merger? There are several dynamics that must be carefully and prayerfully considered. These factors are location, compatibility, and opportunity. For each of these areas, the leader should seek out guidance from their local association and or state convention. These organizations will have data about the churches in their area and may be able to provide some insight regarding specific congregations.

Location, Location, Location

Lord Harold Samuel, a British real estate magnate, once famously said, “There are three things that matter in property: location, location, location.” Perhaps something similar could be said of a potential church merger. Location plays a major part in the decision to initiate contact. The leader must evaluate how the distance of the potential merger church will impact the

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merger. Also, the visibility of the physical location and the community that surrounds the church are critical factors. Depending on the type of merger that will be pursued, the location will affect the merger in different ways.

If the plan is to blend the congregations into a single church at a single location, the distance between the two churches must be closer than in the other merger types. According to a research report published by Baylor University, “the average church-going American lives 6-15 minutes from their place of worship…One in five lives in close proximity (5 minutes or less) to their place of worship. One in ten commutes more than 30 minutes to attend religious services.”

Baylor’s research also concluded that, “The gap between a person’s place of residence and their place of worship has implications. Half of Americans who live within 15 minutes of the place of worship report attending religious services weekly or more…As the distance from a congregation increases, the likelihood of weekly attendance decreases.”

How far will the people travel to attend church? Which location has better visibility from a major roadway? Which facility is in better condition and which has more acreage? Should both properties be sold and a new property be sought? The answers to these questions will influence the decisions in the merger attempt. The location and distance could be less important when the merger is simply about acquiring the property and assets. However, some of the same questions as were considered in the blended merger should also be pondered in an acquisition.

When the objective is to extend the church’s outreach through a satellite congregation, distance and location still matter, but in a different way compared to a blended or acquisition

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116 Ibid.
merger. Are the churches too close to one another? Will the location, acreage, and condition of the facility be conducive to reaching the intended demographics?

Opposites Do Not Attract

In personal relationships, it is commonly said that opposites attract. However, when it comes to church merger opposite do not attract. Every church has its own culture that must not be ignored. Is the congregation comprised mainly of blue-collar or white-collar workers? What is the median age of each congregation? What is the worship style in the services? What is the leadership style of each church as it relates to its pastors, deacons, and or elders? The answers to these questions about cultural distinctions will impact the combining of the churches.

It is therefore, essential that the leader must be realistic regarding whether the intended merger church will be compatible with his congregation? He must seek to identify both the similarities and differences of the two congregations. Later in the process, a thorough determination of non-negotiables will be worked out. But at the start, there need to be some obvious common connections beyond both being a church. If the differences in doctrine, polity, culture and worship are too great, it may be advised to consider another church for a merger.

Some important questions to answer will be: Is the merging church part of the same denomination as your church? Is the church known for any doctrinal teachings that would be considered contrary? Do they have the same worship and music style as your church? What generations are represented within the congregation? Although it is likely that the answers to these questions will reveal that differences exists between the two congregations, the variations need not create an impasse. It must be realized that regardless of how much each church has in common with one another, change will be needed to occur in order to make the blended church relevant for growth.
When Opportunity Knocks

Since the vision of a merger comes from God, it should be no surprise that God will create the opportunity. The Bible is filled with examples of God working in unusual ways to advance His purposes. One such illustration is found in the life of Nehemiah in chapter 2 of the book which bears his name. He was the king’s cupbearer and possessed no political power, no personal wealth and no notoriety. Yet God placed upon him a burden to restore Jerusalem.

One day while serving the king, Nehemiah was overwhelmed with emotion about the status of his homeland. The king took notice of his condition and inquired. The king then asked, “What do you request?” (Neh 2:4a). This was “opportunity knocking” at his door and so Nehemiah “prayed to the God of heaven” (Neh 2:4b). God then opens the door for restoration effort of Jerusalem.

As the leader investigates, he must look for signs that God is at work. What “doors” have been opened and which have been closed? Begin asking such questions as: “Who is willing to discuss the idea of a merger and who is opposed? What churches in your area appears to be good candidates? Who could you speak with in that church?” Beyond asking such questions, how can a leader tell that God is at work? Charles Stanley suggests that there are a variety of ways that God helps us to take notice of His involvement.

1. A restless spirit
2. A spoken word
3. An unusual blessing
4. Unanswered prayer
5. Disappointment
6. Extraordinary circumstances
7. Defeat
8. Financial troubles
9. Tragedy, sickness, and affliction117

The encouraging reality is that God actually wants leaders to join Him in the work He is doing. Henry Blackaby makes the observation that: “God Himself is the One who initiates your involvement in His work. He does not ask you to dream up something you can do for Him. You need to know what He is doing– or is about to do – where you are.”

Blackaby goes on to say, “Whenever God was about to accomplish as new work, He invited people to join Him in His activity.”

Information is Power

The investigation for the merger begins with gathering information about the potential merger church. To make good decisions, you must have good information. The right information will not only answer important questions, it will also help you to ask the right questions. This data can be found from various sources. A few suggested places would be:

- church website and Facebook page
- Google search
- area pastors
- denominational leaders
- visual observation of the church facilities
- visit to a worship service

The leader should gather information from the above other sources before the visit to the worship service. Such information will guide the visit observation. It may, however, be prudent that someone other than the leader makes the actual visit. The leader would likely draw too much attention to the visit and ultimately hinder the collection of information. Caution must be exercised in the investigation so that the potential merger church is not offended or becomes defensive. The visit will be essential as interaction with the members and experiencing their

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119 Ibid., 120.
worship will provide insights that cannot otherwise be obtained. The person making the visit must speak carefully, positively, and honestly. If asked, he should reveal his church affiliation and to some extent, his purpose for attending.

It is also crucial that the person making the visit to the other church notice specific things. It is suggested that the person observing should not be the leader. Therefore, the observer should be instructed on what information they should seek to obtain. To aid in the determination of what data is needed, a pre-site (Figure 21) and on-site (Figure 22) worksheet have been provided. These sheets will identify key areas of information and observation. It is also recommended that the leader schedule a consultation with the area associational director or with personnel from the state convention. The information they will provide should greatly aid leaders with the information on the worksheets.

![MERGER PRE-SITE INVESTIGATION WORKSHEET](image)

Figure 21: Merger Pre-Site Investigation Worksheet

74
At some point, the leaders of the merger churches must speak directly with each other. This conversation is extremely important as it can make or break the merger progress. If the other leader is not known personally, seek to learn all that you can about him. The information that was obtained through the investigation process will help determine how the conversation is set up. It is always best for this conversation to be done in person. Phone calls, emails and text messages cannot fully convey a person’s passion and personality.

Leaders should consider contacting the associational director of missions. He may be able to facilitate an introduction and even assist with the conversation. Having someone involved in
the conversation that knows both leaders and their churches, could be a great benefit. Such an arrangement will make the dialogue less awkward and more productive.

How does the leader initiate such a conversation? MultiSite Solutions Associate, Kristy Rutter, says that “the key to all mergers is relationship…One of the most helpful ways to build instant relationships is the old-fashioned drop-in approach. Stop by, introduce yourself and set up a time to go for coffee and start building relationships.” The initial conversation likely will feel awkward as the talk moves into the merger question. How does one segue into the matter of the merger? Deliberate thought must be given regarding how to craft the conversation.

Tomberlin and Bird offer a few suggestions for starting the conversation:

- Would your church ever consider…?
- Is there a way we could partner together that might be a win for both churches?
- I wanted to tell you that we are looking toward launching a multisite campus in your community. Would you be interested in joining with us?

Caution and sensitivity must be used when framing the discussion. While the leader making the proposal of the merger may be well intentioned, the other leader may misunderstand his motivation. What sounds like an opportunity to expand God’s kingdom to one leader, may in fact, sound like an attempt to simply seize the assets of another church. The suggestion of a merger could be viewed as a criticism of the other church’s ministry, pastor and people. Carefully choose your words and how you speak them. The right words are powerful as Proverbs 18:21 states that, “death and life are in the power of the tongue.”

After the merger proposal is spoken, what next? Remember that the merger plan may be something the other leader has never considered. Although the initiating leader has a passionate

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121 Tomberlin and Bird, Better Together, 150.
vision that has been developed, the concept could be unfamiliar to the other leader. Depending on his background, the other leader may have experiences that give him pause.

Resist the temptation to overload the other leader with too many details at the first meeting. There will be time in later meetings to discuss the minutiae of the details. Speak in visionary terms, be patient and listen to the response. It may take several meetings with the other leader before the next step is taken. Patience is a virtue in step two.

**Step 3: IDENTIFY – Mission, Affiliations and the Non-Negotiables**

One of the major components in the merger of churches is defining and clarifying the church’s identity. From the very start, the church’s mission, affiliations, and non-negotiables must be made clear. How these things are established during the merger process will determine the future direction and likely success of the church ministry.

Since every congregation is unique, it must not be assumed that blending the two ministries should be a simple process. Every church has its own distinct culture, traditions and beliefs. These distinctions must be identified and either incorporated or gracefully eliminated in the creation of the merged church. Failure to negotiate these vital elements up front will result later in needless conflict. Leaders would do well to consider the words of Amos, “Can two walk together, unless they are agreed?” (Amos 3:3).

The Mission

Some may assume the “mission” is already understood and embraced by both congregations. After all, both church’s proudly state that they are committed to the “Great Commission” as recorded in Matthew 28:19-20. Each church affirms that they are called to preach the gospel as commanded in Mark 16:15. Both ministries vow they are focused on seeing
souls saved and the kingdom advanced. Therefore, aren’t both congregations in agreement on what matters?

On the surface, the churches may appear to be in agreement. Each ministry has articulated a similar set of values using comparable wording. However, if the leaders were to go deeper into the specifics of what each church considers to be the mission, it is likely they would discover significant differences. Although in principle the two churches agree, in practice they probably differ from each other.

Clarity regarding the mission is critical to the unity of the congregations. Pastors Kevin DeYoung and Greg Dilbert have provided a working definition for mission. They state that,

“at its most basic, the term mission implies two things to most people: one being sent and two being given a task. The first point makes sense because mission comes from a Latin word (mittere) meaning to send. The second point is implied in the first. When sent on a mission, we are sent to do something—and not everything, either, but rather we are given a particular assignment.”

You see, the mission expresses specifically what the church has been divinely called to do which will determine how it should be accomplished. Therefore, while both churches may agree on the “what,” they may be widely separated on the “how” and the “who.” The “how” is directed toward the methodology that will be used, while the “who” focuses on the community that will be reached. Before a church determines “how” they will pursue their mission, it must first grapple with the question of “who.” Ultimately, it will be the “who” that determines the “how.” Author and denominational director Dennis Bickers asserts that every church must answer the difficult question of “who.”

“Who are we here for?” This question must be asked on a regular basis and will have a major impact on the planning of the church. Most churches today answer that by deciding that they’re here for themselves. Although they would not be

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likely to verbalize such an answer, one can see it in their budget, their planning, their staffing, their programs, their worship services, and the decisions they make in their business sessions…When we ask the question “Who are we here for?” the correct answer is that we’re here for that community.123

Leaders must clearly identify the “who.” They must decide will the merged church focus primarily on its members or its community? Will the church engage in a strategy that resonates with believers or one that connects with the unsaved and unchurched? Failure to match the “who” with the “how” will result in a contradiction in what a church says is their mission and how it actually functions. A Mission Worksheet has been created to assist the leaders as they work through the issue of their mission.

**MISSION WORKSHEET**

It is your mission that determines what your church will do and who it will focus on reaching. The mission must be clearly stated, clearly understood and memorably stated. Your mission will ultimately define the “who” and the “how” of your mission strategy. Take time to work through this chart so that you have developed the right mission for the merged church.

1. **WHAT:** Write out the mission statement for the merged church. Make sure that the statement is easily understood and concise enough to be memorable. Avoid using ambiguous terms.

2. **WHO:** Identify who will the mission focus on and why?

3. **HOW:** Describe one method that your church is currently using that works to advance the mission as stated above.

Describe one method that your church is currently using that is not working to advance the mission as stated above.

- Do both methods support the “who” of the mission as well as the “how”?
  - Yes ☐ No ☐
  - Why or why not?

4. **What changes in your methodology do you now notice that need to be adjusted to bring it into alignment with your mission?**

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Affiliations

Another component of a church’s identity is its denominational and network associations. All churches, even those who claim to be non-denominational, usually have some kind of connection to other like-minded churches. These affiliations are often linked to the church’s doctrine, polity and practices. Such relationships need to be compatible with the other merging church.

Even within the same denomination, there can be great differences that have the potential to be divisive. For example, within churches who identify as Baptist, there can be varied theological distinctions. Some Baptist churches lean toward Calvinism or reformed theology while other congregations are more Arminian or somewhere in the middle. Some Baptists, as in the Southern Baptist Convention, are theologically conservative, while others such as the Cooperative Baptist Fellowship, are more theologically liberal. The North American Mission Board lists 24 different Baptist groups in North America. Since there are so many different Baptist groups, the possibility for division is not unpredictable.

The merging churches must identify their affiliations and determine which should be maintained and if any should be abandoned. This could be a challenge, especially if the churches are not a part of the same group. The leadership should address this matter as soon as possible and ask these essential questions:

- What are the denominations or networks of the merging churches?
- Are these affiliations compatible with the mission and membership?


125 For a greater treatment on the subject of denominations, refer to the Handbook of Denominations in the United States written by Craig D. Atwood, Frank S. Mead and Samuel S. Hill, (Nashville, TN: Abingdon Press, 2010). The book provides the historical, doctrinal and organizational description of many of the denominations that can be found in North America.
• Will these affiliations remain or will they be changed? If they are to change, how will they be altered?
• Does the membership understand the reason and relationship regarding the church affiliations?
• Has the membership embraced the denominational and network connections?

Non-Negotiables

In almost every merger, there are negotiations. Seldom does everyone get everything they want in the final arrangement. Therefore, each congregation needs to determine what things they are willing to compromise and which things are non-negotiable.

In the research that was presented in the previous chapter, churches documented nine non-negotiable categories. The list included: doctrine, Bible versions, music style, worship style, church name, missionary support, leadership structure, financial structure and affiliations. While each congregation will have a position on these items, it will be necessary for the leaders to determine where concessions are possible and where they are not.

**Doctrine** – Survey respondents (90%) indicated that the top non-negotiable was their doctrine. Failure to recognize the vital role that doctrine has in a merger will likely result in significant disagreement. Bickers says, “Without a solid foundation, a building will not stand. This is also true for churches. For a healthy church, this foundation must be sound theology and doctrine. While there are areas in which good people can disagree, there are also beliefs that are essential to the faith, and the church must not deny them.”

Although it is likely there will be agreement on basic theological teachings, the leadership should still explore each church’s doctrines and determine areas of potential conflict. Minor differences should be expected and embraced with charity, however, doctrines of

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soteriology should be carefully examined. Terms such as “repentance,” “faith,” “believe,” and “justification,” may sound familiar, but could carry a very different meaning from church to church. This confusion of terminology could also be true of the issue of eternal security. Therefore, clarity is needed on doctrine and especially on what constitutes the Gospel. John MacArthur warns that, “the Gospel message itself must be acknowledged as a primary point of fundamental doctrine.” Like R.C. Sproul has said, “Before we can have unity in the gospel, we must first agree to what the gospel is.” Doctrine should bind and unite the church.

The confession of what we believe is at the core what makes a merger possible. Tomberlin and Bird’s research shows that “mergers have the best chance of success when there is at least an 80% match in doctrine, philosophy of ministry and ministry style between the two churches.” A worksheet has been provided to assist the leadership in determining the doctrinal compatibility of both merging churches. It is recommended that leaders utilize the worksheet even if both churches embrace the same doctrinal statement, such as the *Baptist Faith and Message*. Other doctrinal matters like, the rapture, creationism and homosexuality could be issues that need clarification. The worksheet will provide an opportunity to identity and address such beliefs.

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**Figure 24: Doctrine Worksheet**

**DOCTRINE WORKSHEET**

This worksheet has been created to guide merging churches in evaluating the compatibility of their doctrinal positions. Any theological variations should be noted, deliberated, and if possible, resolved.

1. Carefully note the doctrinal statements of each congregation. Are there any significant differences?  
   □ Yes  □ No

2. If “yes” note the variations: ____________________________
   ______________________________________________________
   ______________________________________________________
   ______________________________________________________
   ______________________________________________________

3. Do you consider any of the variations to be non-negotiable? □ Yes □ No
   - If “yes” note which doctrines: ____________________________
     ______________________________________________________
     ______________________________________________________
     ______________________________________________________
     ______________________________________________________

4. Can the issue(s) of non-negotiable doctrine be resolved? If so, how? If not, then what?
   ______________________________________________________
   ______________________________________________________
   ______________________________________________________
   ______________________________________________________

5. What is your definition of the GOSPEL? ____________________________
   ______________________________________________________
   ______________________________________________________
   ______________________________________________________
   ______________________________________________________

6. Do both congregations agree on the definition of the GOSPEL? □ Yes □ No
   - If “no” describe the discrepancies: ____________________________
     ______________________________________________________
     ______________________________________________________
     ______________________________________________________
     ______________________________________________________
   - Is it possible to resolve the discrepancies? If so, how? If not, then what?
     ______________________________________________________
     ______________________________________________________
     ______________________________________________________
     ______________________________________________________

**Bible Versions, Music Style, and Worship Style** – Even though many may consider such things as Bible versions, music style, and worship style to be secondary issues, approximately 20% of the survey respondents indicated that these were non-negotiable. These matters are minor when both of the merging churches are already in agreement. However, whenever change will be required, use caution. Do not be naïve to believe that doctrinal unity alone is enough to advance the merger. Thom Rainer observes that “any significant change in an organization will have reactions that extend well beyond the change itself.”

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some church members “treat the church more like a country club than a church. They view their financial offerings as dues to get perks and privileges…An entitled church member expects his worship style. She expects her color of the rooms and temperature in the worship center.”

Leaders must ask the right questions at the start of the merger to avoid unnecessary conflicts after the merger. A worksheet has been created to assist the leaders in working through these issues.

![Figure 24: Versions and Style Worksheet]

**Church Name** – The merged church will either take on the name of one of the churches in the merger or else it will identify by another name. According to the research survey, 40%
consider the choice of a church name to be a non-negotiable. It is likely that if one church has
developed an exceptional reputation in the community that the merged church would want to be
identified by that name. However, for a variety of reasons, the merged church may desire a new
name that is representative of the blended congregation. Rainer’s research has revealed seven
trends in church names that may assist in selecting a new church name:

1. **Newer churches are consistently using descriptors in their names other than
denominational affiliation.**
2. **Denominational names, though, are still dominant among church names.**
3. **The most common church name is “First Baptist.”** Over 5,000 churches have this name.
4. **Many words are becoming common in newer church names.** Some of those words are Christ, Community, Fellowship, Assembly, Center, Chapel, Life, Faith, Bible, Grace, and New.
5. **Outsiders are often confused about church names.**
6. **The Internet has led to shorter church names.** Churches are choosing names that don’t become a long URL.
7. **Church names may be important, but they are not the most important factor in people choosing a church home.** Relationships, personal invitations, good preaching, and friendly people, among other reasons, still trump the church name as the reason someone chooses a particular church.132

Missionary Support and Affiliations – As the merged church determines its ecclesiastical
affiliations, the vehicle of missionary support also needs to be established. Missionary support is
accomplished through a church’s denomination, a network or through direct support of
individual missionaries. The level of support is usually a percentage or a fixed amount. Data
from the survey showed that 20% considered the method of missionary support as a non-
negotiable. While the method of mission support being a non-negotiable is relatively a small
percentage, it could still pose a potential problem if not properly addressed. It would be helpful
to the merger for the leaders to ask and answer the questions below to determine how they intend
to fund missions.

• Will missionary funding be accomplished entirely through the church’s denominational agency or network?
• Will individual missionaries be eligible for financial support? If so, what is the criteria?
• Will missions giving be a designated percent or designated amount from the church budget or is it part of the church’s contribution to the denomination?

Leadership Structure and Financial Structure – On the question of who and how will the church be lead, the survey revealed that 60% of respondents said the leadership structure was a non-negotiable. Concerning the financial structure only 30% stated that it was a non-negotiable. The leaders and congregations need to know who will be the lead pastor after the completion of the merger. How will the church be governed (congregational, elders, etc.) and how will it manage its finances? What will be the criteria for creating the church budget? The specifics of the leadership and financial structure will be addressed in Step 5 of this paper.

Step 4: INSTRUCT - Define the Merger Process

Once it the decision is made to pursue the merger, the leadership should outline the process that will be followed. Careful attention must be given to what steps must be done to advance the merger and what will be the timeline for its accomplishment. Details matter because mergers are complicated and the end result of this effort impacts the churches. The leadership should develop a merger process document. This document needs to provide clarity and accountability as the churches navigate through the merger.

What should be included in the merger process document? In his doctoral thesis, Samuel Holdbrook-Smith suggests that certain elements should be a part of the document:

The Merger Document should include but is not limited to a brief history and future intent of the proposed merged church; new vision and mission statements of the proposed merged church; a timeline and process for executing the proposed merger; and a resolution identifying the merging churches and outlining the intents and conditions of the proposed merger. The document must include who may vote for the proposed merger and the percent of vote required for passage of
the resolution. Each of the churches involved in the proposed merger must be given enough time to study the Merger Document and separately vote on the resolution.133

Tomberlin and Bird provide a template of such a document in their book, Better Together. The basic outline of the document is:

- **Doctrinal**: Theological Beliefs / Governance / Affiliations
- **Philosophy of Ministry**: Mission, Vision, and Values / Strategy / Worship Style / Preaching / Membership / Programs / Budget
- **Personnel**: Expectations / Senior Pastor / Boards and Committees / Staff / Missionaries
- **Legal**: Church Name / Voting / Property and Facility / Assets and Liabilities / Debt Management
- **Time Line**134

It must be remembered that the merger is not only a missional connection but also a relational connection. The people of the church are not just strangers who gather for an event, they are part of a family. Throughout the New Testament believers are spoken of as “brothers” and “sisters” (1 Cor 7:15, Jas 4:15). Although all believers are related by Christ’s redemption, the members of the merged church will now worship and serve together in the same local church. The two congregations will need to develop personal relationships that go beyond a superficial acquaintance. Therefore, built into the process should be opportunities for joint worship, fellowship and dialog. Matt Rogers in his book, Mergers, states that:

“…the picture of the church painted during the join service needs to be a genuine reflection of what the new church will look like. The leaders need not abandon essential marks of the air Church in an effort to win approval. A genuine and honest representation of the shape and form of the new Church is vital. At this point, the joint service should not be approached in a way that attempts to “win

133 Holdbrook-Smith, Strategy for Merging Unhealthy Churches, 162.

134 In Appendix B, pages 198-205 of Jim Tomberlin and Warren Bird, Better Together: Making Church Mergers Work (San Francisco, CA: Jossey-Bass, 2012), an example is provided of how two congregations created a merger document. The document details the merger issues that were discussed and negotiated as well as the final resolution. The example used is actually more of a final statement of agreement than process, however, the categories listed are details that should be included in the development of a process document.
votes” but rather should be seen as a way of exposing people to the new church…\textsuperscript{135}

Leaders must also resist temptation to move through the merger too quickly. It seldom benefits a leader to rush things. Although the situation may “feel” like things are progressing too slowly, the wise leader will be patient. This is often difficult to do as John Maxwell observes, “Just about everyone would agree that patience is a good quality; we admire it and desire it. Those of us who need it most are least inclined to cultivate it however.”\textsuperscript{136}

Successful mergers take time. Tomberlin states that, “the average length of merger process beginning with initial conversation to merger completion is seven months.”\textsuperscript{137} The research survey data in chapter 4 of this paper showed seventy percent of the respondents reported taking approximately six months to complete their merger. The remaining thirty percent of respondents reported taking more than 6 months to complete the merger. Of course, every merger brings a different set of circumstances and so the amount of time required to navigate through the merger completion will vary.

When constructing a process, several elements should be included. After the completion of merger steps 1-3 (Step 1: Inspire, Step 2: Investigate, and Step 3: Identify) the work of communicating the merger to both congregations begins. First, fully inform the staff and deacons of the merger plan. Take time to thoroughly explain and clarify what you have done and what you envision is the path forward. Entertain their questions and allow for discussion while listening to their feedback. Next, schedule meetings with the various church groups and their

\textsuperscript{135} Rodgers, Mergers, 59.


leaders (small groups teachers, worship ministry, children’s ministry, student ministry, etc.). Coordinate opportunities in smaller settings where members can get accurate and complete information about the merger plans. Remember to seek to lead the people rather than drive them. Finally, a carefully worded statement should be spoken to the congregation in a service. The announcement should make clear that the leadership is exploring the possibility of a merger. The statement needs to be visionary and persuasive. The leader is not seeking to convince the church to support the merger but rather, to be supportive of the process. This is where the skills of leadership are needed. John Maxwell has observed that successful leaders must, “…possess a positive attitude. You’ve got to have faith that you can take your people all the way. If you cannot confidently make the trip in your mind you’re not going to be able get in real life. On the other hand, you will also half to be able to see the fact realistically. You cannot minimize obstacles or rationalize your challenges.”

Several meetings will need to be scheduled. Leaders should determine who is invited, the time duration, location, and the specific agenda of the meetings. The following categories should have meetings scheduled:

- Review of Corporate Documents
- Identifying the Non-Negotiables
- Establishment of Areas of Agreement
- Negotiating Areas of Differences
- Exploring Legal Issues
- Adoption of Ministry Model
- Acceptance of Leadership Structure
- Formation of Final Merger Agreement

Should the meetings lead to a final merger agreement, it will be time to initiate a joint worship service and fellowship time. These events will provide the membership with an

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opportunity to personally interact with one another. Be sure these encounters have been carefully planned and will be well attended. This worship and fellowship should be positive experiences.

Just prior scheduling a vote, a congregation question and answer meeting should be scheduled. Leaders should provide the audience with a copy of the final merger agreement and be prepared to clarify any points in the document. Rogers advised that,

During this meeting the Summary Plan of Merger should be distributed and the "but what about" questions should be answered. This document should not be distributed ahead of time. If it is, the congregations will form opinions about the decisions outlined in the document prior to hearing from the pastors themselves. The unity of the pastors’ ability to cast vision and the formality of the written document will help to provide the information most people will need to make an informed decision about the merge.¹³⁹

Deadlines should be set in order to keep the process moving. To assist the leadership as they navigate through the development of the merger process, a template has been included.

¹³⁹ Rodgers, Mergers, 56-57.
Step 5: ILLUSTRATE - Determine the Ministry Model and Leadership Structure

The merged church will take on a certain form or structure as to how the congregation conducts ministry and how leadership will function. The configuration of this ministry model and leadership structure needs to be affirmed and articulated. Basically, it is a question of, “How will the church do ministry?” and “Who will be leading the church?” The answers to these questions will provide direction for the membership as they seek to engage in the church’s vision and mission.
Ministry Model

The merged church will follow some kind of form or model as to how it operates. Ed Stetzer defines “model” as “constructions and symbols of a reality—they are guides, but not exact representations of what we do. (No church fits a model, but they can apply a model.) In other words, models help label and give descriptions to certain practices.” Church growth experts have developed categories for various types of models. Such models include: Traditional, Seeker-Sensitive, Discipleship, Organic House Church, Purpose-Driven, Attractional, Evangelistic, Liturgical, Simple Church, and Missional. While these groupings are not exhaustive, they can be useful in labeling a specific style and illustrating the way the church ministry functions.

Malphurs states that “every church is a model, whether it likes it or not. Church models are all about how we do church, and every church does church some way.” The particular designator such as “Seeker-Sensitive” or “Missional,” may or may not fully describe the church’s model. In fact, it is possible the church has developed a new model. Regardless of what label is used, the church follows some pattern of ministry structure. It is necessary to evaluate whether that particular form is best suited for the merged church.


Since every church possesses a uniqueness, its leaders must be careful not to emulate a model that is incongruence with the community or their congregation. Malphurs reminds church leaders that, “a model that works well in one locale may not work at all somewhere else. And many of us do not have the leadership gifts and skill that other successful leaders have…learn from the models anything that may be helpful to your ministry situation…” Leaders should invest time working through what model will be embraced and understanding the rationale behind the particular model. What exactly is the model that will be utilized? Will that chosen model serve the merged church in pursuing its vision and fulfilling its mission? What should be the results of implementing the church model? Who will the model impact and why? The leaders should understand what their model is designed to accomplish and whether it is a compatible form for reaching their community. A worksheet has been provided to facilitate the discussion and development of the right ministry model.

143 Ibid., 164.
Leadership Structure

One of the most essential issues that must be addressed is the church’s leadership structure. The subject of how the leadership will be organized, can potentially be a very emotional, divisive and difficult subject. Great care must be exercised as it is handled. The current leadership structure of both churches will impact the approach that is embraced.

No Pastor – According to Tomblerin and Bird’s research, “about 30 percent of churches going into a merger do so without pastors in both churches.”\textsuperscript{144} Should both churches not have a pastor, they will need to develop a process defining how the merged congregation will move

\textsuperscript{144} Tomblerin and Bird, \textit{Better Together}, 119.
forward in its search and selection of a minister and other staff. Issues related to forming the search committee, candidate format, compensation and selection criteria must be settled and documented.

Two Senior Pastors - The research recorded in chapter 4 revealed that in forty percent of the mergers, the joining-church currently had a senior pastor. In only twenty percent of the mergers did the joining-church’s senior pastor remain on staff in a subordinate position. In the majority of mergers, the joining-church’s pastor will depart after the merger is approved. There are various reasons why this is so often the case. Rarely, do the pastors share the leadership in a co-pastor capacity. In the research in chapter 4, none of the merging church opted for a co-pastor arrangement. Although it may be best for the church, the departure of one of the pastors has the potential of hurting feelings and being viewed as negative. It would be wise in such a situation to provide a severance package and for the membership to express their appreciation and well wishes for the departing pastor.

Joining-Church Pastor Becomes Staff Pastor – In some cases the joining-pastor is able to transition into a support role within the merged church. The position will be largely dependent on the size of the congregation. His role could be that of an Executive Pastor, Associate Pastor or if the intent is to make the joining-church a multi-site, his role could be Campus Pastor. Should it be decided that the joining-pastor will remain on staff, the role of the senior pastor and that of the staff pastor must be clearly established. As Tomberlin and Bird note, “It is not easy to give up the authority and privileges of the senior pastor position and submit and adjust to a lesser role in the lead church. It means you are no longer the primary preacher or the one in charge. Failure to
navigate this transition well can result in strained relationships and even a premature forced departure.”

Step 6: IMPLEMENT - Work Through the Legal Issues and the Vote

According to the Scriptures, the church is a body, the body of Christ. The Apostle Paul wrote, “Now you are the body of Christ, and members individually” (1 Cor 12:27). It is therefore, important that the New Testament local church be viewed as a spiritual entity. It is not a secular business or a political organization. The church is not ruled by human government but by its head, Christ. Paul said, “And He [Christ] is the head of the body, the church, who is the beginning, the firstborn from the dead, that in all things He may have the preeminence” (Col 1:18).

Although the church is a spiritual institution that is subject to Christ, the Bible also makes clear that it is operate within the context of its society. Paul elaborated on this dynamic as he wrote to the church at Rome.

1Let every soul be subject to the governing authorities. For there is no authority except from God, and the authorities that exist are appointed by God. 2 Therefore whoever resists the authority resists the ordinance of God, and those who resist will bring judgment on themselves. (Rom 13:1-2)

5Therefore you must be subject, not only because of wrath but also for conscience’ sake. 6 For because of this you also pay taxes, for they are God's ministers attending continually to this very thing. 7 Render therefore to all their due: taxes to whom taxes are due, customs to whom customs, fear to whom fear, honor to whom honor. (Rom 13:5-7)

The Bible instructs believers to be “subject to governing authorities…pay taxes…render due customs.” Although the secular government does not oversee the church, God expects the church to comply with governmental requirements and laws, that is, as long as they do not

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145 Ibid., 122.
violate the law of God. (Acts 5:29). Therefore, the church must not only be in compliance with
the laws of God, but also to some extent, the laws of the secular government.

In the United States, 85% of all churches are incorporated.146 This reality has legal
implications for churches that pursue a merger. The merger will not only join together two
congregations, it also will also join together two non-profit corporations. So, the leadership of
the merging churches must be careful to proceed with the merger in a way that observes the legal
aspects required under the law of the church as well as the law of the government.

The Legal Matters

When officially combining two congregations, the legal process of both the church’s
constitution and bylaws and the state’s non-profit corporation laws must be followed.147 The
leaders must carefully review both church’s governance documents to assure that their actions
are permissible within the context of their established rules. They must also be sure that their
actions satisfy the requirements set forth by the state and local legal authorities. These actions
must be in compliance with all three entities, the lead-church, the joining-church and the
government.

There are many questions that must be considered and answered. David Middlebrook, an
attorney with the Church Law Group, gives this advice for merging churches:

Mergers are complicated, and many issues must be addressed when undertaking one.
Here are some of the questions you should ask before starting the merger process:
• Who has the legal authority to approve the merger? What happens if some
  members of the church aren’t on board with what’s going on?

churches-a-new-day/.

147 This section related to legal matter is not definitive. It is strongly recommended that every congregation
seek legal advice from a local attorney.
• What rights do the people have who funded purchases of the land, facilities, and other assets of the joining church?
• What are the obligations of board members from the lead church and the joining church?
• How should moral obligations be handled, such as an earlier promise to the longtime secretary of the joining church, whose leaders had verbally promised that the church would take care of her in her retirement?
• Will there be a name change for one or both congregations? How will that be decided?
• How will the decision to merge be decided, and by whom? What do each church’s bylaws require? Will a congregational vote be required? If so, what will be the process and what percentage is required for approval? Even if not required, will a vote or poll be conducted as a way for the congregation to affirm their views? What is the lowest approval percentage the two churches are willing to accept?
• What will the new church entity do with any property and facilities gained in the merger? Will the property and facilities be kept or sold? What are the legal requirements and state laws for transfer of church property?
• What debt does either church bring to the merger? How manageable is it?
• When is the earliest possible date a merger could occur between the two churches? What are the things that need to happen, and by when, for a merger to occur?
• In short, how can the merger be done legally, morally, and ethically?148

According to chapter four’s research, seventy percent of churches sought legal advice regarding the merger. Also, eighty-six percent of that seventy percent actually used the services of an attorney in the merger process. It is recommended for the two congregations to secure the services of an attorney who could assist them in navigating through the legal issues of the merger. Rogers observes that “church mergers have a business component to them due to the change of ownership of facilities and assets. Also, there is potential for dissenting voices to threaten legal action. Thus, it is advisable for the churches to secure legal counsel in assessing their current bylaws, the merger process up to this point and the needed documents for the final merger boat to take place.”149


149 Rodgers, Mergers, 56.
The Vote

Once the details of the merger have been worked out and the leadership of both congregations are in agreement with the final arrangements, it is time to make the merger official. The official acceptance of the agreement will demand approval by the congregation or in some cases, the church elders, depending on the requirements of the bylaws. As stated in the previous section of this chapter, the vote must be accomplished within the parameters outlined in the church governance documents. Be sure to know by what percentage is required for the vote to pass. In some instances, the vote may only need a simple majority and in other cases it may need two-thirds for approval.

It is strongly advised that the churches do not prematurely take a vote. Rushing into a vote before the majority of the congregation is agreeable will undermine all of the work that has been invested in the merger process. The leadership should evaluate the congregational support level and proceed to the vote only after they are convinced that the merger plan has been effectively communicated. Dirk Elliot, in his book, *Vital Merger*, states that,

Periodic, non-binding straw poll votes are helpful in judging the buy-in of the congregation and in pointing out areas where communication may need improvement...The advantages of conducting a straw poll are to gauge support from the congregation and identify their primary objections. The straw poll ballot form should include an opportunity for the people to voice objections and ask questions. The merger team can then work to answer the questions and identity where better communication is needed.\(^\text{150}\)

Once the leadership concludes that the merger proposal is ready for a vote, a date should be scheduled for both churches to vote on the same Sunday. Be certain that the vote is announced in advance and follows the time frame mandated in the governance documents. After the vote is taken, the results of the vote should be conveyed to each church as soon as possible so that the

\(^{150}\) Dirk Elliot, *Vital Merger* (Fun and Done Press, 2013), 74.
congregations may celebrate. This is a great day in the life of these two churches. They are now no longer two individual churches but one united congregation. Although there is one more step, Rogers compares the vote to a marriage. He says, “Much like a marriage, the churches are declared one on the vote Sunday. There should not be an opt-out clause or perception of a trial run. Rather the merger should work like a marriage, and divorce should not be an option.”¹⁵¹

**Step 7: INTEGRATE - Blend the Two Congregations**

The final step in the merger process is not only putting into motion the actions prescribed by the merger agreement, but also, the blending of members into one family. The people must now worship together, pray together, serve together and do ministry together. Since the vote has approved a merger, both congregation must learn how to function as one. No longer should the members use the term “their church.” The people must begin to view themselves as one church family. This transformation will take time and will demand a concerted effort by everyone to embrace the merged church as one united congregation.

In anticipation of the merger approval, the leadership should have a strategy that addresses the transitional elements of the merger. There will be much that needs to be done on a legal, organizational and relational level to blend the two entities. Integrating the two ministries effectively will require direction and intentional efforts. Rogers recommends that:

> “…churches should seek to unite their gatherings as soon as feasible. Wise teams will have begun to make preparations for the uniting of the churches before the vote is taken. This will allow for an effective and speedy transition that minimizes the lull created between the vote Sunday and the first Sunday the churches meet together as one church. Once the voting is made official the churches should unite quickly and begin the hard work of uniting in mission.”¹⁵²


¹⁵² Ibid., 60.
Organizational Unity

Depending on the specifics stated in the merger agreement, a variety of organizational transitions will need to be acted upon. In some cases, a name change was agreed upon. In all cases a new set of bylaws will need to be created. Unless these things were done prior to the vote, it will be necessary for them to be accomplished in a timely manner so not to hinder the church’s progress.

The leadership must create a transitional strategy for the organization. This plan should include the needed changes that will be required in the church’s:

- state corporation documents
- property deeds
- property and facility insurance
- business liability insurance
- bank and investment accounts
- business and utility accounts
- debts and loans
- payroll and payroll taxes
- accounting and record keeping
- budget

Additionally, it will be necessary to have a plan for the operation of the church’s ministries. The proposal should answer the question of how will the lead-church and the joining-church integrate the people into a single, unified ministry? Who will serve where and in what capacity and who will be the designated leaders of each ministry area?

Relational Unity

As it was stated earlier, the church is more than an organization, it is a living organism—the body of Christ. This truth speaks to the relational component that bonds the congregation together. The Apostle Paul wrote about this when he said, “that there should be no schism in the
body, but that the members should have the same care for one another” (1 Cor 12:25). Unless a sense of community is formed the two congregations will never truly be merged.

Andy Stanley notes, “one of God’s biggest dreams for us is authentic community—the kind of meaningful relationships that are best characterized by oneness with Him and with one another...God has called the church to create environments where authentic community can take place.”153 Although leaders cannot manufacture community in the church, they can take steps that encourage the formation of meaningful relationships. Some suggested ways to promote relational unity in the merged church are:

- **Prayer Times** – Schedule times when members can come together to pray with and for one another. As members become aware of the needs of others, it will help to engender compassion and concern for one another.

- **Fellowship Events** – Organize gatherings that allow members to intermingle with one another in a social setting. The more the people know one another, the greater the possibility for the formation of a meaningful relationship.

- **Small Groups** – Develop a system of small groups where members can interact with one another on a weekly basis. These groups are more than a Bible study, these groups are occasions for members to care and share their lives.

- **Volunteer Opportunities** – Lead members into serving in the church with one another. As members work alongside each other to advance the mission, a spirit of unity can form.

- **Leadership Development** – Establish regular times for church leaders to be encouraged and equipped to promote community within their respected ministries.

- **Ministry Workshops** – Empower members who serve to discover new ways in which they can advance and preserve unity within the church.

Having a merge church that is unified and in community is hard work. Paul instructed the church that it must constantly be, “endeavoring to keep the unity of the Spirit in the bond of

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peace” (Eph 4:3). Unity is difficult to achieve and even harder to maintain. There are no easy solution but the end result is worth the effort.

The approval vote, merely signaled the start of the difficult task of blending two into one. It is now the job of everyone within the church to answer the prayer of Jesus. He prayed, “that they all may be one, as You, Father, are in Me, and I in You; that they also may be one in Us, that the world may believe that You sent” Me. (John 17:21). When the merged church reflects such a oneness, it reflects the image of Christ to the world.
Chapter 6

Conclusion

In this thesis, it has been noted that the majority of congregations in America have plateaued or are in decline. Only a small percentage of churches are actually growing. Unfortunately, church leaders are often in denial or else unaware of the precarious situation they are facing. Their failure to take decisive action has resulted in the death of many churches as every year more churches close their doors.

However, some of today’s leaders have chosen a different response. They have sought to explore various ways to revitalize congregations. Instead of accepting that decline is inevitable, these pastors have used new methods that offer help and hope to churches. It was therefore the purpose of this thesis project to propose that one such option for church renewal is that of a church merger.

This research examined whether a systematic approach to mergers could offer some churches the opportunity to overcome the decline or stagnation they were experiencing. The project proposal was scripturally based, observing popular trends, evaluating expert advice, and investigating data from research and actual church mergers. The results identified what practices were used by churches in their merger attempt and which of those practices were most beneficial. This information was analyzed and incorporated into the development of a practical step-by-step merger approach.

Several things were learned through this thesis research as recorded in chapter four:

- **Materials** - The thesis hypothesis held true; there are few church merger resources available. Only twenty percent of survey respondents read any materials on church mergers. Only two merger books were referenced in the
survey. None of the available church merger materials provided a step-by-step process for leaders to follow when working through a merger.

- **Inexperience**: The survey revealed church leaders had no prior experience with a merger. Only one participant had been a part of a merger consideration, and that merger was never carried out. The majority of leaders (80%) did however, seek out advice from someone they considered to be knowledgeable and had experience regarding church mergers.

- **Size**: Larger churches tended to be the ones who initiate mergers. The data showed that sixty percent of churches over 200 began the process with another church of which eighty percent were under 50 members. Both the large and small congregations viewed the merger as a means to promote growth.

- **Motivation**: The dominant driving force behind the mergers was a desire to advance the mission of the church. Seventy percent of the pastors indicated that “mission” was one of the main reasons for pursuing the merger. Although several other reasons were listed, none were higher than the mission.

- **Type**: Basically, the churches that participated in the survey created either a blended or multi-site merger. In half of the mergers, the smaller church became part of a single congregation or else it became a multi-site of the larger church. In both cases the merger was seen as an expansion of the ministry.
While much was discovered in this thesis research, there were also some limitations that were noticed. Should further work be pursued on this topic, the data and its insights could be improved in several ways:

- **Geographical:** The survey data was collected from only churches within a specific geographical area (the Greater-Jacksonville, Florida area). The geography connects with the social, economic and ethic grouping of the community. A sampling of churches from a more rural or urban setting could be beneficial to churches exploring mergers within such a context.

- **Numerical:** The number of participants that responded to the survey was a relatively small number. Since mergers only involve a minority of churches, it would be helpful to increase the number of respondents. More churches that share their experience will result in gaining a better perspective on mergers.

- **Denominational:** The research was restricted to Baptist churches in the Jacksonville Baptist Association area. While this information is very helpful to Jacksonville Baptists, it may not be as useful for churches in other associations or denominations.

- **Informational:** The survey questions could be enhanced to obtain greater insight into the decisions that were made. Many of the questions sought to identify what was decided or what action was taken. Some of the questions failed to inquire as to the reasoning for the decisions and actions. Knowing what choices were made is beneficial, however, knowing the specific motivation behind each action would provide a better understanding.
In a climate where most congregations are facing issues of survival or just seeking to maintain the status quo, mergers offer an opportunity to breathe new life into the church. Pastors and members who have the vision and courage to take such a step could find that a merger is exactly what is needed to bring about revitalization and renewal. The steps outlined in this paper can effectively guide those who determine that a merger is God’s direction for their church.
Bibliography


Appendix A: Church Merger Survey

CHURCH MERGER SURVEY

1. Who initiated the initial contact for the merger?
   - You
   - Someone Else
   - If someone else, what was their position? ________________________________
   - The initial contact was made by?
     - A Personal Conversation
     - A Letter or Email
     - A Mutual Friend / Acquaintance
     - Other: ________________________________

2. What was the congregational size of the churches?
   - Your Church:
     - Less than 50
     - 50-75
     - 76-100
     - 101-200
     - More than 200
   - The Other Church:
     - Less than 50
     - 50-75
     - 76-100
     - 101-200
     - More than 200

3. Was the other church of the same Baptist affiliation as your congregation?
   - Yes
   - No
   - If “No,” what was their affiliation? ________________________________
   - If there was a difference in affiliation, how did you handle this?
     - The other church dropped its affiliation.
     - Your church joined the other church’s affiliation.
     - Other: ________________________________

4. What was the main reason(s) that the merger was pursued? (Check all that apply.)
   - Location
   - Multi-Site
   - Economic
   - Facility
   - Reconciliation
   - Multi-Ethnic
   - Preservation
   - Mission
   - Other: ________________________________

   - What type of merger was pursued?
     - Blended
     - Acquisition
     - Multi-Site
     - Franchise
     - Other: ________________________________

5. How long did the merger process take?
   - Less than 6 months
   - 6 months-1 Year
   - More than 1 Year
CHURCH MERGER SURVEY

6. Did you read any materials on church mergers that were helpful?
   □ Yes □ No
   • If “Yes,” list what materials: ____________________________________________
     ____________________________________________
     ____________________________________________

7. Prior to this merger, have you had any experience with church mergers?
   □ Yes □ No
   • If “Yes,” please describe your experience: ________________________________
     ____________________________________________
     ____________________________________________

8. Did you seek out advice from a consultant or experienced pastor as you went through the merger process?
   □ Yes □ No
   • If “Yes,” did this adviser have personal experience in church mergers?
     □ Yes □ No □ Not Sure

9. Did the merger create a new congregation for both churches (new bylaws, new name, etc.)?
   □ Yes □ No
   • If “No,” which congregation became the lead congregation?
     □ Your Church □ The Other Church

10. Did the other church already have a senior pastor?
    □ Yes □ No
    • If “Yes,” what was the outcome for the other senior pastor?
      □ He became the senior pastor of the merged church.
      □ He left the church.
      □ He became the co-pastor of the merged church.
      □ He remained on staff in another position.
      □ Other: ____________________________________________
11. Did the congregations seek out legal advice during the merger?
   ☐ Yes   ☐ No
   • If “Yes,” were the services of an attorney used?
     ☐ Yes   ☐ No

12. What items were considered to be “non-negotiables” within the merger?
   □ Doctrine  □ Bible Versions  □ Music Style
   □ Worship Style  □ Church Name  □ Missionary Support
   □ Leadership Structure  □ Finance Structure  □ Affiliations
   □ Other: __________________________________________________

13. What was the percentage of “in favor” votes?
   • Your Church:
     □ 100%  □ 99-90%  □ 89-80%  □ 79-60%  □ 59-50%  □ < 50%
   • The Other Church:
     □ 100%  □ 99-90%  □ 89-80%  □ 79-60%  □ 59-50%  □ < 50%

14. Did any members leave the church as a result of the merger?
   ☐ Yes   ☐ No
   • Do you consider the number that left to be a significant amount?
     ☐ Yes   ☐ No

15. Do you consider the merger to be successful?
   □ Yes   □ No   □ Not Sure
   • Why? __________________________________________________________
     __________________________________________________________
     __________________________________________________________
     __________________________________________________________
     __________________________________________________________

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Appendix B: Church Merger Survey Results

1. Who initiated the initial contact for the merger?
   - You: 5
   - Someone Else: 5
     - If someone else, what was their position?
       - Church Trustee: 1
       - Church Board: 1
       - Associational Leader: 1
       - Senior Pastor: 1
       - Deacon: 1

   - The initial contact was made by:
     - A Personal Conversation: 8
     - A Letter or Email: 2
     - A Mutual Friend / Acquaintance: 0
     - Other: 0

2. At the time of the merger, what was the congregational size of the churches?
   - Your Church:
     - Less than 50: 0
     - 50 -75: 2
     - 76-100: 1
     - 101-200: 1
     - More than 200: 6
   - The Other Church
     - Less than 50: 8
     - 50 -75: 0
     - 76-100: 1
     - 101-200: 0
     - More than 200: 1

3. Was the other church of the same Baptist affiliation as your congregation?
   - Yes: 10
   - No: 0
     - If “No,” what was their affiliation? NA
     - If there was a difference in affiliation, how did you handle this?
       - The other church dropped its affiliation. NA
       - Your church joined the other church’s affiliation. NA
       - Other: NA
4. What was/were the main reason(s) that the merger was pursued?
   - Location 4
   - Multi-Site 3
   - Economic 5
   - Facility 2
   - Reconciliation 1
   - Multi-Ethnic 0
   - Preservation 5
   - Mission 7
   - Other: 0

   • What type of merger was pursued?
     - Blended 5
     - Acquisition 1
     - Multi-Site 4
     - Franchise (Part of a Network of Churches) 0

5. How long did the merger process take?
   - Less than 6 months 7
   - 6 months – 1 Year 2
   - More than 1 Year 1

6. Did you read any materials on church mergers that were helpful?
   Yes: 2  No: 8
   • If “Yes,” list what materials:
     - Transitioning by Dan Southerland
     - Better Together by Jim Tomberlin and Warren Bird

7. Prior to this merger, have you had any experience with church mergers?
   Yes: 1  No: 9
   • If “Yes,” please describe your experience:
     - Walked through the process with another church for about a year and the merger did not transpire.

8. Did you seek out advice from a consultant or experienced pastor as you went through the merger process?
   Yes: 8  No: 2
   • If “Yes,” did this adviser have personal experience in church mergers?
     Yes: 7  No: 0  Not Sure: 1
9. Did the merger create a new congregation for both churches?
   Yes: 1  No: 9
   - If “No,” which congregation became the lead congregation?
     o Your Church: 7
     o The Other Church: 2

10. Did the other church already have a senior pastor?
    Yes: 5  No: 5
    - If “Yes,” what was the outcome for the other senior pastor?
      o He became the senior pastor of the merged church. 2
      o He left the church. 1
      o He became the co-pastor of the merged church. 0
      o He remained on staff in another position. 1
      o Other: 1 (retired)

11. Did the congregations seek out legal advice during the merger?
    Yes: 7  No: 3
    - If “Yes,” were the services of an attorney used?
      Yes: 6  No: 1

12. What items were considered to be “non-negotiables” within the merger?
    o Doctrine 9
    o Bible Versions 2
    o Music Style 1
    o Worship Style 2
    o Church Name 4
    o Missionary Support 2
    o Leadership Structure 6
    o Finance Structure 3
    o Affiliations 3
    o Other: 0

13. What was the percentage of “in favor” votes?
    - Your Church:
      o 100% 9
      o 99-90% 0
      o 89-80% 1
      o 79-60% 0
      o 59-50% 0
      o < 50% 0
• The Other Church:
  o 100%  2
  o 99-90%  6
  o 89-80%  1
  o 79-60%  0
  o 59-50%  0
  o < 50%  1

14. Did any members leave the church as a result of the merger?
   Yes: 5  No: 4  No Answer: 1
   • Do you consider the number that left to be a significant amount?
     Yes: 6  No: 1  No Answer: 3

15. Do you consider the merger to be successful?
   Yes: 7  No: 2  Not Sure: 1
   • Why?
     o Our church would have been in foreclosure proceedings if not for the merger. We consider the merger a win–win!
     o Was of God. Deliberate and transparent.
     o The spirit and health were totally different. We moved to a better location.
     o After the initial stress of change, things have settled out and we are growing.
     o Their merger process went well. But as we sought to combine and unite two congregations, complaining began and that caused people to leave. The church we merged with wanted us to build a building too soon. Because we didn’t build, some people complained and left. This caused a big wave of people leaving. We by God’s grace recovered. But it was very hard.
     o It was the “changing of the guard” as an older church was given new life and leadership was handed over to a young staff.
     o The merge congregation is healthy. Attendance has risen from 20 to 150+. Souls have been saved. Baptisms happen regularly. The gospel is going forth from them. The original church members are thrilled and remain engaged.
Appendix C: Worksheets

MERGER VISION DESTINATION WORKSHEET

The leader must know where the vision will lead his church. He must also be able to distinctly articulate the destination in terms that can be understood by the congregation. This worksheet will guide the leader in defining the vision’s destination.

1. What type of merger will you pursue?
   - Blended Merger
   - Acquisition Merger
   - Multi-Site Merger
   - Franchise Merger

2. Write out a brief description of the merger type you selected in the above question. Try to state this in simple terms which would help the congregation understand the merger type.

3. How will this type of merger assist in fulfilling the vision?

4. Do you see any current opportunities for a merger? Describe what they are and why you believe them to be an option.

5. What challenges do you anticipate will be connected to this type of merger?
MERGER PRE-SITE INVESTIGATION WORKSHEET

Gather good information to help you make good decisions. Use the online resources such as the websites, Facebook and Google search. Get input from area pastors and denominational leaders that are familiar with the church. Take a drive by the church noticing their location and facilities. This worksheet will assist you in collecting the needed information prior to a site visit.

1. What church do you believe may be a good candidate for a merger?

________________________________________________________________________

2. Where is the church located and how many miles away is it from your church location?

________________________________________________________________________

3. Is the church located on or is visible from a major roadway? □ Yes □ No
   Describe the area where the church is located. ____________________________
   ______________________________________________________________________

4. How long has the church been in existence? __________

5. Does the church have a senior pastor? □ Yes □ No
   If yes, what do you know about him? ________________________________________
   ______________________________________________________________________
   Are there other staff? □ Yes □ No
   Who are they? __________________________________________________________

6. What denominational affiliation is the church? ____________________________

7. What is the size of the congregation? __________

8. Is there anything in the church's doctrine or practices that concerns you? □ Yes □ No
   If so, why? ____________________________________________________________
   ______________________________________________________________________

9. Do you know anyone who is a member or who has been a member of the church? □ Yes □ No
   If yes, whom? __________________________________________________________
   What were their comments about the church? ________________________________
   ______________________________________________________________________

10. How is the appearance of the outside of their facilities? _____________________
    Describe their facilities. _________________________________________________
    ______________________________________________________________________
MERGER ON-SITE INVESTIGATION WORKSHEET

To make good decisions, you must have good information. The right information will not only answer important questions, it will also help you to ask the right questions. This worksheet will guide you through the investigation process.

1. What was the attendance in worship? ____________

2. How many could their auditorium seat? ____________

3. What was their worship and music style? ________________________________

4. What Bible translation did they use? ________________________________

5. How was the spirit or attitude of the congregation? (Check all that apply)
   - Friendly
   - Joyful
   - Committed
   - United
   - Positive
   - Unfriendly
   - Sad
   - Apathetic
   - Divided
   - Negative

   Describe your impression: ________________________________________________

   ____________________________________________________________________

6. What was the generational makeup of the congregation?
   - Children: __________
   - Teens: __________
   - Young Adults: ________
   - Middle age: ________
   - Seniors: _________

7. What was the condition of the facilities? ________________________________

   ____________________________________________________________________

8. What were your thoughts on the sermon that was preached? ________________________________

   ____________________________________________________________________

9. Did you have a conversation with the pastor or a church leader?  □ Yes □ No
   - If yes, describe your conversation. ________________________________

   ____________________________________________________________________

10. Other observations? ________________________________________________

   ____________________________________________________________________
MISSION WORKSHEET

It is your mission that determines what your church will do and who it will focus on reaching. The mission must be biblically based, clearly understood and memorably stated. Your mission will ultimately define the “who” and the “how” of your missional strategy. Take time to work through this sheet so that you have developed the right mission for the merged church.

1. **WHAT**: Write out the mission statement for the merged church. Make sure that the statement is easily understood and concise enough to be memorable. Avoid using ambiguous terms.

2. **WHO**: Identify who will the mission focus on and why?

3. **HOW**: Describe one method that your church is currently using that works to advance the mission as stated above.

   Describe one method that your church is currently using that is **not working** to advance the mission as stated above.

   - Do both methods support the “what” of the mission as well as the “who”?
     - [ ] Yes  [ ] No

   Why or why not?

4. What changes in your methodology do you now notice that need to be adjusted to bring it into alignment with your mission?
DOCTRINE WORKSHEET

This worksheet has been created to guide merging churches in evaluating the compatibility of their doctrinal positions. Any theological variations should be noted, deliberated, and if possible, resolved.

1. Compare the doctrinal statements of each congregation. Are there any significant differences? □ Yes □ No

2. If “yes” note the variations.

3. Do you consider any of the variations to be a non-negotiable? □ Yes □ No
   - If “yes” note which doctrines.

4. Can the issue(s) of non-negotiable doctrine be resolved? If so how? If not, then what?

5. What is your definition of the GOSPEL?

6. Do both congregations agree on the definition of the GOSPEL? □ Yes □ No
   - If “no” describe the discrepancies.
   - Is it possible to resolve the discrepancies? If so, how? If not, then what?
VERSIONS AND STYLES WORKSHEET

This worksheet is designed to help each of the merging churches to assess their position on the issues of Bible versions, music styles and worship styles. Identifying any areas of disagreement will facilitate discussion and provide an opportunity for the resolution of such conflict.

1. Is having a designated Bible version for all preaching and teaching a non-negotiable issue?
   - Yes □ □ No
     - If “yes” describe why this is an issue. __________________________________________________________
       __________________________________________________________
       __________________________________________________________

     - What would you consider to be an agreeable outcome? ____________________________________________
       __________________________________________________________
       __________________________________________________________

2. Is a specific music style (hymns, contemporary, modern, etc.) a non-negotiable issue?
   - Yes □ □ No
     - If “yes” describe why this is an issue. __________________________________________________________
       __________________________________________________________
       __________________________________________________________

     - What would you consider to be an agreeable outcome? ____________________________________________
       __________________________________________________________
       __________________________________________________________

3. Is a specific worship style (This is not the music but the service format. – liturgical, traditional, blended, seeker-sensitive, etc.) a non-negotiable?
   - Yes □ □ No
     - If “yes” describe why this is an issue. __________________________________________________________
       __________________________________________________________
       __________________________________________________________

     - What would you consider to be an agreeable outcome? ____________________________________________
       __________________________________________________________
       __________________________________________________________
MERGER PROCESS

ANNOUNCEMENT TO EXPLORE A MERGER
• When: ______________________
• What to Say: _____________________________________________________________
   _____________________________________________________________
   _____________________________________________________________

LEADERSHIP MERGER MEETINGS
Leadership Merger Members: _________________________________________________
• When: ______________________ Review of Corporate Documents
• When: ______________________ Identifying the Non-Negotiables
• When: ______________________ Establishment of Areas of Agreement
• When: ______________________ Negotiating Areas of Differences
• When: ______________________ Exploring Legal Issues
• When: ______________________ Adoption of Ministry Model
• When: ______________________ Acceptance of Leadership Structure
• When: ______________________ Formation of Final Merger Agreement

JOINT WORSHIP SERVICE
• When: ______________________ • Where: ________________________________
  Details: ________________________________________________________________

JOINT FELLOWSHIP
• When: ______________________ • Where: ________________________________
  Details: ________________________________________________________________

CONGREGATION QUESTION AND ANSWER MEETING
• When: ______________________ • Where: ________________________________
  Details: ________________________________________________________________

CONGREGATION VOTE ON MERGER
• When: ______________________
  Details: ________________________________________________________________
CHURCH MINISTRY MODEL WORKSHEET

Every church follows some kind of a model for ministry. The church model is an illustration of how the congregation does ministry. Determine what form the merged church will follow. This worksheet will assist leaders in processing the model that will be used.

1. Describe the type of church model that will be used.

2. Why has this particular type of model been chosen?

3. How will this model support the church’s vision and mission?

4. What is the expected result of utilizing this model?

5. Who will this model impact and why?
January 2, 2015

Andrew J. Pietrylo
IRB Exemption 2075.010215: Church Merger Survey

Dear Andrew,

The Liberty University Institutional Review Board has reviewed your application in accordance with the Office for Human Research Protections (OHRP) and Food and Drug Administration (FDA) regulations and finds your study to be exempt from further IRB review. This means you may begin your research with the data safeguarding methods mentioned in your approved application and no further IRB oversight is required.

Your study falls under exemption category 46.101(b)(2), which identifies specific situations in which human participants research is exempt from the policy set forth in 45 CFR 46:101(b):

(2) Research involving the use of educational tests (cognitive, diagnostic, aptitude, achievement), survey procedures, interview procedures or observation of public behavior, unless:
   (i) information obtained is recorded in such a manner that human subjects can be identified, directly or through identifiers linked to the subjects; and (ii) any disclosure of the human subjects’ responses outside the research could reasonably place the subjects at risk of criminal or civil liability or be damaging to the subjects’ financial standing, employability, or reputation.

Please note that this exemption only applies to your current research application, and any changes to your protocol must be reported to the Liberty IRB for verification of continued exemption status. You may report these changes by submitting a change in protocol form or a new application to the IRB and referencing the above IRB Exemption number.

If you have any questions about this exemption or need assistance in determining whether possible changes to your protocol would change your exemption status, please email us at irb@liberty.edu.

Sincerely,

Fernando Garzon, Psy.D.
Professor, IRB Chair
Counseling

(434) 592-4054

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